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# Global Trust Survey 2024

A Report On The Level Of Trust  
In Market Research  
Around The Globe

**Focus on New Zealand**

April 2024





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# Read Me: I'm Important

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## Introduction by Andrew Cannon, Executive Director, GRBN

“Trust is a precious thing. It is hard to build and easily lost.”

“Trust cannot be taken for granted. It needs to be earned.”

Two simple, but powerful truths I believe, but why should we, the global market research sector, care about the general public’s trust?

The general public is the lifeblood our sector relies on. Without people’s willingness to voluntarily give us their time, their opinions and access to their data, our industry is ill-equipped to meet the needs of decision-makers, who rely on the data and insights we provide to inform their decisions.

The findings from this survey tell us that the general public has a “reasonable” amount of trust in our sector. This is good, but is it good enough? Should we rest on our laurels?

I believe not. I believe that our sector has much to gain from being more trusted by the general public. Not only would this improve response rates and data quality, but also differentiate our industry from others who are also playing in the data space, both in the eyes of the general public, but also in the eyes of business decision-maker and the authorities.

I believe that trust with personal data will become more, rather than less, important in the years to come. The data from this survey shows that our industry is, in my opinion, punching below its weight on this matter. A definite opportunity for us to improve.

And, as we move to deploy more and more AI solutions, we need to be aware that, currently at least, AI, on balance, decreases rather than increases the amount of trust the general public has in our sector.



Andrew Cannon

Executive Director, GRBN

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## Thought Leadership – GEOFF LOWE, RANZ

### Will Trust Always Matter to the Insights Industry?

Trust in how others use our personal data will almost certainly become an even bigger issue as the use of data held about us becomes more prevalent. To the extent that people believe market researchers use personally identifiable information (PII) in their endeavours, the increasing importance of trust will apply to our industry. On the face of it, then, it would make sense for industry associations like RANZ to invest in educating the public about what data we collect, how we use it and how we keep it safe. In my experience, market researchers take incredible levels of care to treat respondent data securely and with respect (that we all abide by various Codes of Practice is good evidence for this). If that is indeed the case, the task would primarily be a communication challenge.

If we accept that proposition, **the next question is obvious...** How do we communicate our message and how do we fund that communication?

**Or is it?** Perhaps there is another question we should ponder first...

How much longer will we rely on the public's cooperation to complete our surveys? This is a serious question discussed at the 2024 RANZ/APRC Conference - *The Future of Insights: Where are all the Humans?* A case was made, albeit with some opposition, that synthetic data will obviate the need to connect with real humans for researchers to do what we do. If accuracy, cost and speed advantages of synthetic data materialise over the next few years, how much should we invest over those years in building trust among people we may not need to bother any more?



## Thought Leadership – GEOFF LOWE, RANZ

I can imagine a future beyond even synthetic data when multi-modal AI models have evolved to the point where we will engage with them exactly as we would any other intelligent agent - another human, for example.

We currently rely on data (the rows and columns kind) to build knowledge and understanding of the world around us. In this future, our AI colleague is able to help us identify product, brand and marketing opportunities and to exploit those opportunities without our kind of data being part of the process. The AI of this future has gained knowledge and understanding from the world (real and digital) directly. In other words, our AI friend is aware of everything, everywhere, all at once.

At this point, our industry will have been fully disrupted.

Of course, it is unknown whether this happens at all, let alone in a time frame meaningful to those of us contemplating the possibility. However, when resources are scarce and the potential efficacy of any communication campaign is unknown, even the possibility of such a future transpiring within years rather than decades should give us pause.

GEOFF LOWE

RESEARCH ASSOCIATION NEW ZEALAND (RANZ)







## Thought Leadership – LISA SALAS, OVATION RESEARCH

### **Building Trust Through Transparency: Overcoming Data Security Concerns and AI Scepticism**

In the dynamic landscape of New Zealand's consumer market, market research stands as a critical tool for deciphering the wants and behaviours of consumers. This insightful practice not only helps businesses tailor their offerings to meet consumer needs but also fosters innovation and drives economic growth. However, amidst the recognition of its benefits lies a notable challenge: consumer concerns regarding data security and scepticism towards the use of artificial intelligence (AI) in market research.

Market research serves as a compass for businesses, guiding them towards informed decision-making by uncovering valuable insights into consumer preferences and behaviours. Yet, despite its undeniable importance, a significant portion of New Zealand consumers harbour apprehensions about the security of their personal data held by market research agencies.

Trust in market research hinges on transparency, integrity, and accountability. There is a growing expectation for research agencies to be up-front about their data collection practices, methodologies, and the purposes for which data is being utilised. Any perceived deviation from these principles risk eroding trust and credibility.

The recent Trust Survey reveals a striking divide: while approximately one-third of consumers acknowledge the benefits of market research, nearly half express worries about the safeguarding of their personal data. This disparity underscores the pressing need for market research agencies to prioritise data security and transparency to allay consumer concerns and maintain trust.

Moreover, the landscape is further complicated by widespread scepticism towards the use of AI in market research. Despite the potential for AI to enhance the efficiency and accuracy of data analysis, many consumers remain wary of companies that advocate its advantages. This scepticism is rooted in concerns about data privacy, algorithmic biases, and the potential for AI to infringe upon individual autonomy.





## Thought Leadership – LISA SALAS, OVATION RESEARCH

Understanding the reasons behind this scepticism and applying clear processes is vital for market research practitioners.

Robust data protection measures must be implemented to safeguard individuals' privacy rights throughout the research lifecycle. This includes obtaining explicit consent for data collection, anonymising sensitive information, and adhering to established privacy regulations such as the Privacy Act 2020. Access controls and data encryption are vital to protect data from unauthorised access and limit access to sensitive information to authorised personnel.

A commitment to ethical AI practices, such as ensuring that algorithms are developed and deployed with careful consideration given to issues of fairness, bias, and discrimination. Mechanisms for auditing and assessing the ethical implications of AI systems should be implemented to mitigate potential harms.

As a collective industry, it's key that we promote and support consumer awareness regarding the importance of their data, the potential risks linked to sharing it, and their entitlement to manage their personal information. When the public is well-informed, they are better prepared to handle the challenges of the digital era.

To gain trust in market research, it's crucial to make sure that privacy, data protection, and AI use match what consumers expect and what's ethically right. This helps lessen doubt and encourage trust, leading to better cooperation. To do this well, we need to deal with concerns about data security and doubts about AI. By focusing on being open, acting ethically, and involving consumers, we can create a trustworthy environment that helps both businesses and consumers. Through continuous communication and proactive measures, we can maintain the integrity of market research in New Zealand amid the complexities of the digital age.

LISA SALAS

OVATION RESEARCH





## Background & Sample

- The primary objective of the research is to understand the level of trust the general public has in the market research industry across the globe, both overall and specifically when it comes to the handling of personal data.
- The secondary objective is to understand more broadly how trust in different types of organizations and bodies compares across the globe.
- Fieldwork was conducted between the 12<sup>th</sup> and 24<sup>th</sup> of February 2024.
- The report compares the results for 2024 to the 2022 Global Trust Survey, fieldwork for which was conducted in July 2022. Trended data is shown throughout the report, many times reported as the +/- in percentage point change in the 2024 data vs. 2022 data.

The LOI is less than 10 minutes and two versions of the questionnaire were administered:

- Version 1 asked respondents first about trust with personal data and has been used to report on questions relating to personal data
- Version 2 asked respondents first about overall trust and has been used to report on questions relating to overall trust, as well as the perceived benefit of market research
- Versions 1 and 2 combined were used to report on questions relating to the market research experience
- The sample has been designed to be representative of the population aged 18+ in each country, split 50%/50% into two cells, with each cell balanced by quotas.
- The countries covered and the sample provider responsible in each country are shown on the following page.



## Background & Sample (Cont'd)

The countries covered and the sample provider responsible in each country are shown below:

	Country	Fieldwork Partners	Sample Size
	Australia	Ovation Research	1003
	Japan	Rakuten Insight	1000
	South Korea	PMI	1002
	New Zealand (NZ)	Ovation Research	501
	Canada	Quest Mindshare	1000
	Mexico	Netquest / Offerwise / Question Pro	1051
	United States (US)	Innovate MR / Rakuten Insight	1006
	Germany	Bilendi	1000
	Spain	Bilendi	1000
	United Kingdom (UK)	Opinium	1000

Fieldwork Management, programming and data processing: InnovateMR  
 Reporting: RTi Research. Translations: Empower MR, Multilingual Connections

## KEY TAKEAWAYS





## Key Takeaways

- ✓ Consumer trust in market research companies is average relative to other types of organizations in New Zealand. That said, it fares better than data analytics or election & opinion polling companies.
- ✓ The value market research brings to businesses is recognized, but there's opportunity to boost perceptions as it relates to individuals.
- ✓ While there's still opportunity to improve the survey experience, survey length is generally deemed acceptable in New Zealand.
- ✓ There's widespread distrust in how industries, including market research, handle personal data.
- ✓ New Zealanders are highly skeptical of AI use in market research and express great distrust of companies touting its benefits.
  - This is especially true regarding the use of AI chatbots and avatars for online interviews, particularly when dealing with sensitive topics.



**SNAPSHOT VIEW OF:  
TRUST IN &  
IMPRESSIONS OF  
MARKET RESEARCH**



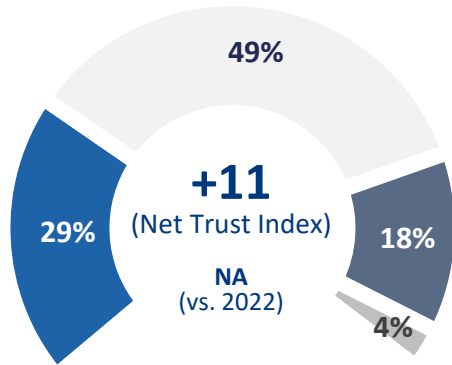


Public trust in market research companies is a net positive in New Zealand, but data privacy practices are a concern.



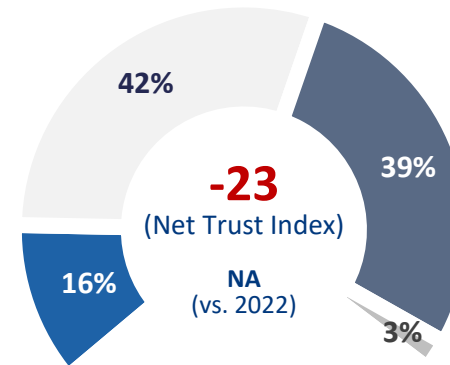
New Zealand

### Overall Trust of Market Research Companies



### Trust of Market Research Companies to Protect & Appropriately Use Personal Data

- Trust
- Not Sure
- Do Not Trust
- Don't know



Net Trust Index = % Trust – % Do Not Trust

Overall Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was +10 (Market Research companies ranked 7<sup>th</sup> of 15)

Personal Data Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was -7 (Market Research companies ranked 11<sup>th</sup> of 15)

Base: Version 1 Respondents (250)

Base: Version 2 Respondents (251)



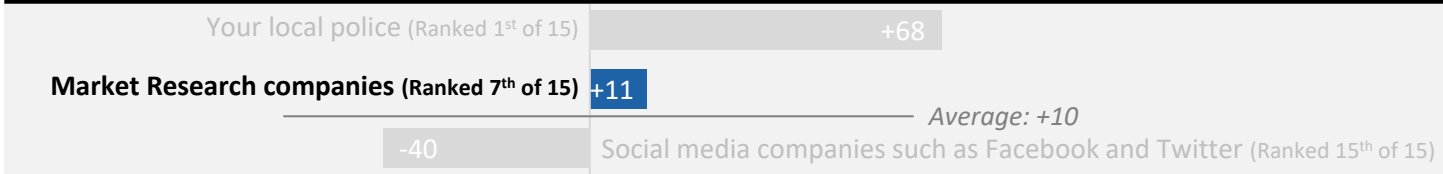


Compared to other surveyed organizations, market research companies rank in the middle for perceived trust but slightly lower in terms of perceived use of personal data.

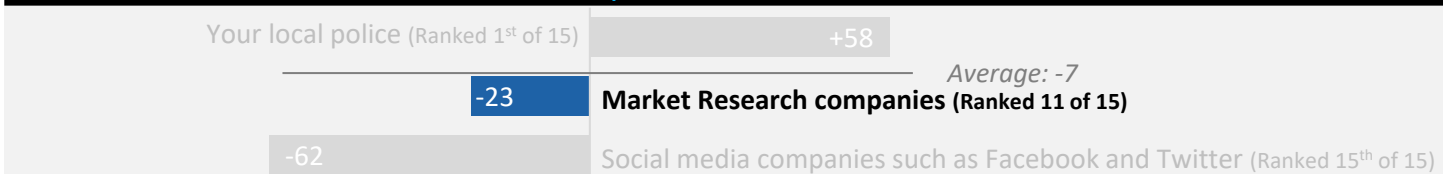


New Zealand

### Overall Trust of Market Research Companies – Net Trust Index



### Trust of Market Research Companies Use of Personal Data – Net Trust Index



*Net Trust Index = % Trust – % Do Not Trust*



Consumers in New Zealand see some personal value in market research, but data privacy concerns exist, at least in part due to a perceived lack of transparency.



New Zealand

17%

NA

of consumers feel the **use of personal data** by market research companies is **appropriate**

48%

NA

of consumers are **concerned** that **personal data** held by market research companies is **securely protected**

18%

NA

of consumers feel **informed** by market research companies about **how their data is collected, stored and used**

27%

NA

of consumers **believe** market research **benefits them**

*Appropriate = 5-Completely Appropriate/4*

*Concerned = 5-Completely Concerned/4*

*Informed = 5-Completely Informed/4*

*Benefits = 5-Benefits Completely/4*

Base: Version 1 Respondents (250)

Base: Version 2 Respondents (251)

**LEVEL OF  
OVERALL TRUST**

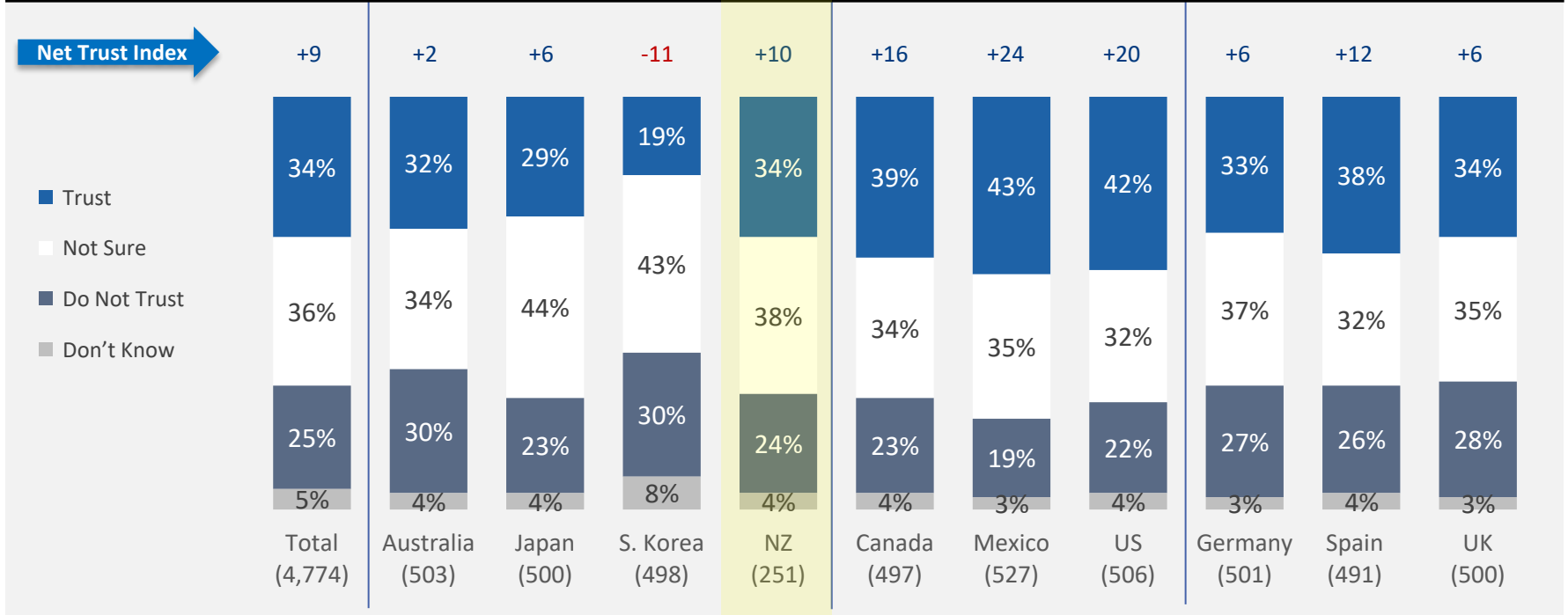




While there's a foundational level of trust in organizations/professionals overall, most countries also exhibit a sizeable level of distrust. In this regard, New Zealand is similar to the global average.



### Average Level of Trust Across Organizations/Professionals†



Net Trust Index = % Trust – % Do Not Trust

†Scores are an average across the 15 industries/organizations analyzed



Consumers place the most trust in law enforcement by far in New Zealand, followed by finance, health authorities and retailers. Market research companies rank in the middle, while media, social media and companies providing AI tools incur the most doubt.



New Zealand

## Level of Trust by Organizations/Professionals



Net Trust Index = % Trust – % Do Not Trust

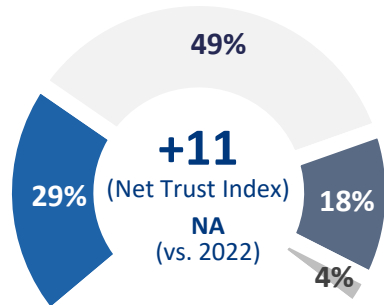


Market research companies command the most trust across the “insights space.”

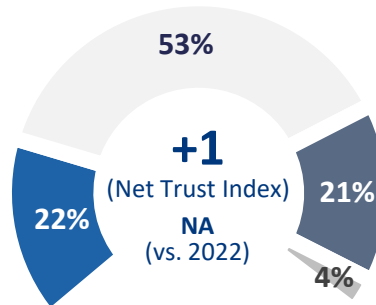


New Zealand

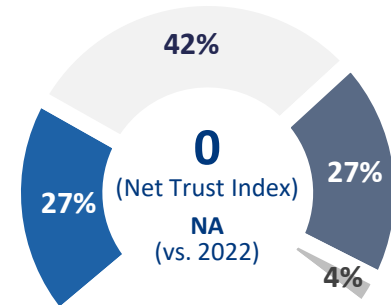
### Trust in Market Research



### Trust in Data Analytics



### Trust in Election & Opinion Polling



- Trust
- Not Sure
- Do Not Trust
- Don't know

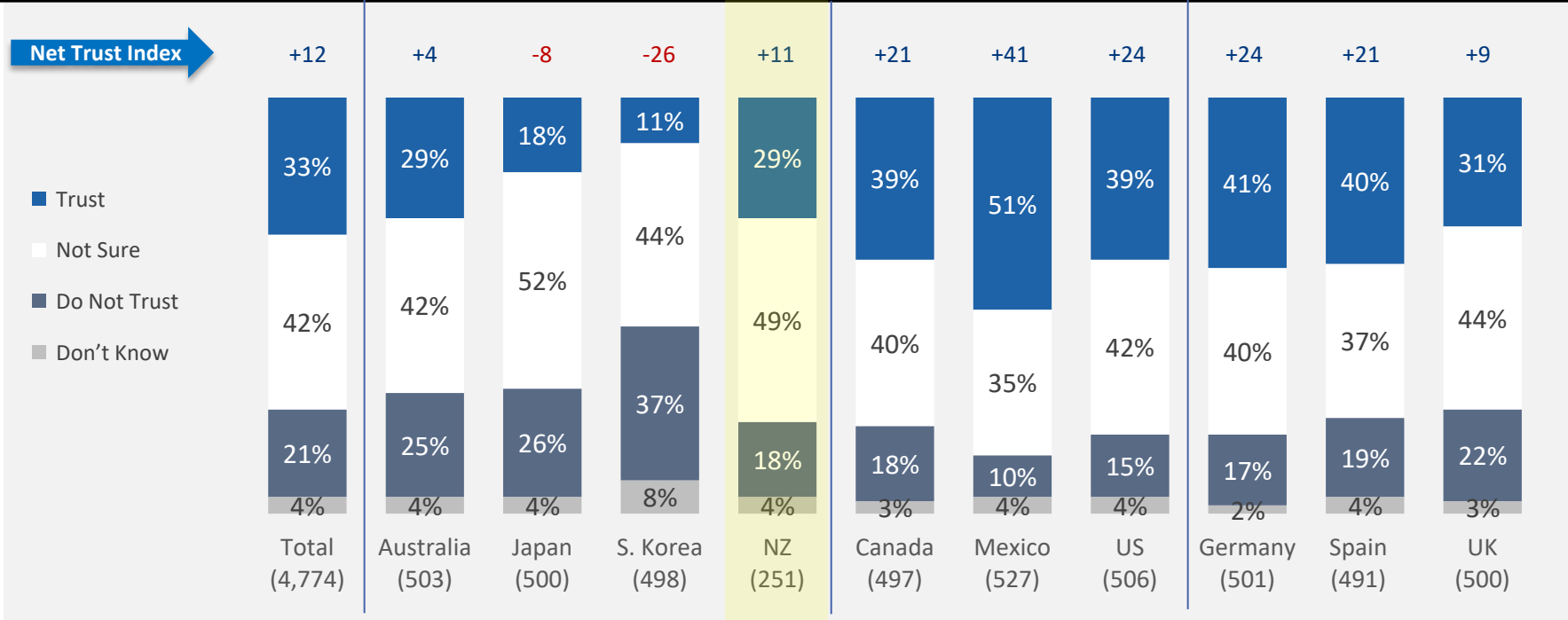
Net Trust Index = % Trust – % Do Not Trust



Trust in market research companies varies considerably by country and cultural bias certainly plays a part in this variation. In NZ, trust is similar to the global average.



### Trust in Market Research



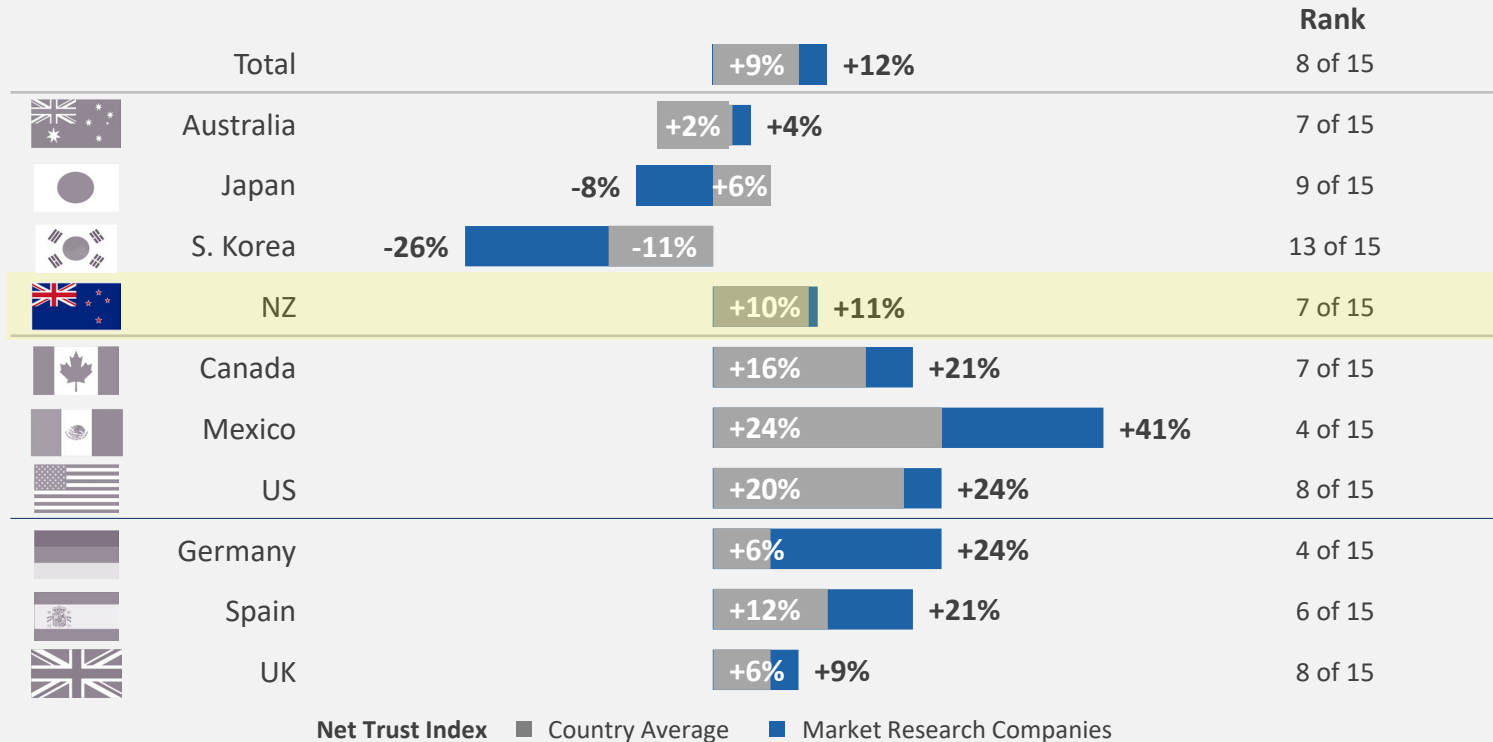
Net Trust Index = % Trust – % Do Not Trust





In New Zealand, trust in market research typically ranks in the middle of the pack, aligning with the global average.

### Trust in Market Research (vs. Country Average)



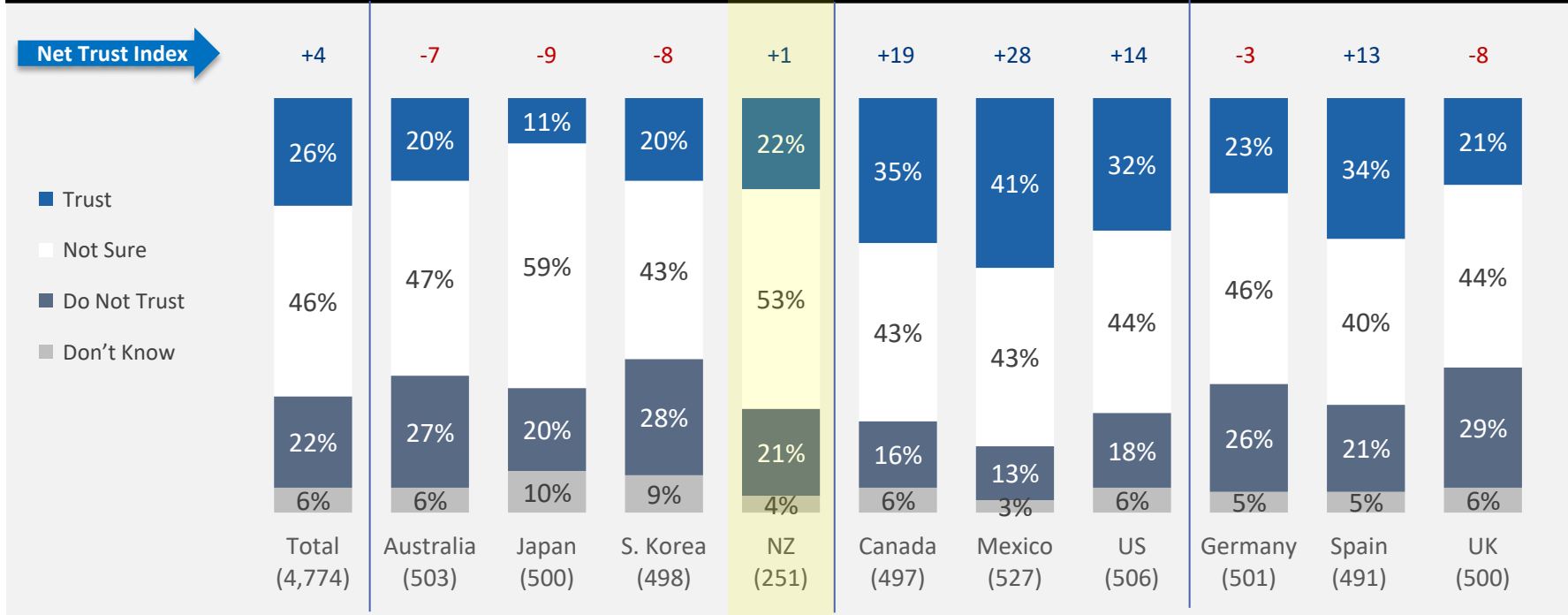
Net Trust Index = % Trust – % Do Not Trust



While New Zealand consumers are divided on their trust in data analytics companies, net perceptions are fairly similar to the global average.



### Trust in Data Analytics



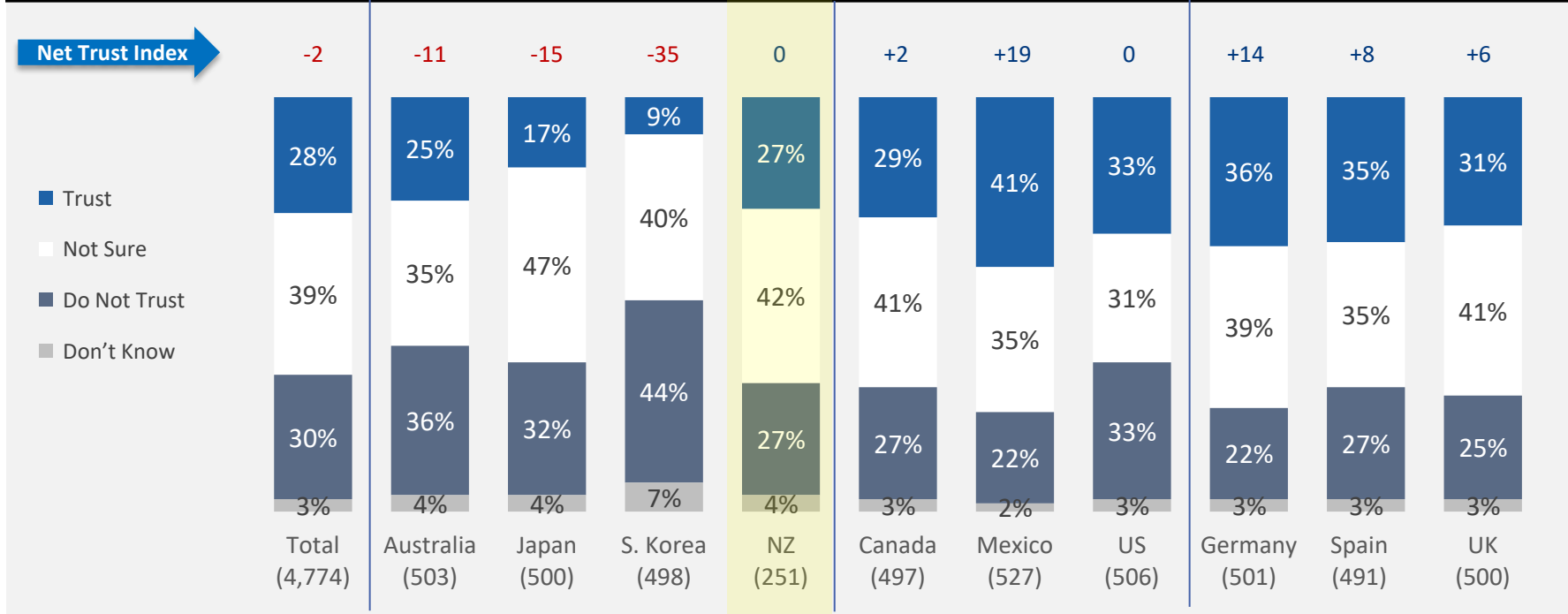
Net Trust Index = % Trust – % Do Not Trust



On a net basis, trust in election & polling is equally split among New Zealand consumers.



### Trust in Election & Opinion Polling



Net Trust Index = % Trust – % Do Not Trust

**BELIEVABILITY THAT  
MARKET RESEARCH  
IS BENEFICIAL**





The value of market research is more apparent for businesses than for individuals.



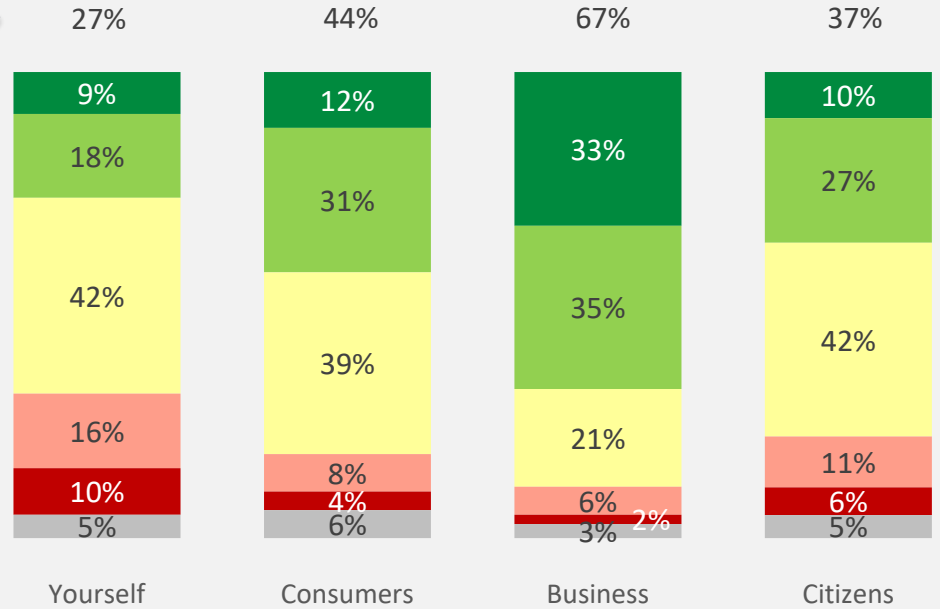
New Zealand

### Extent Market Research is Perceived to be Beneficial



- 5 – Benefits completely
- 4
- 3
- 2
- 1 – Does not benefit at all
- Don't Know

Top 2 Box

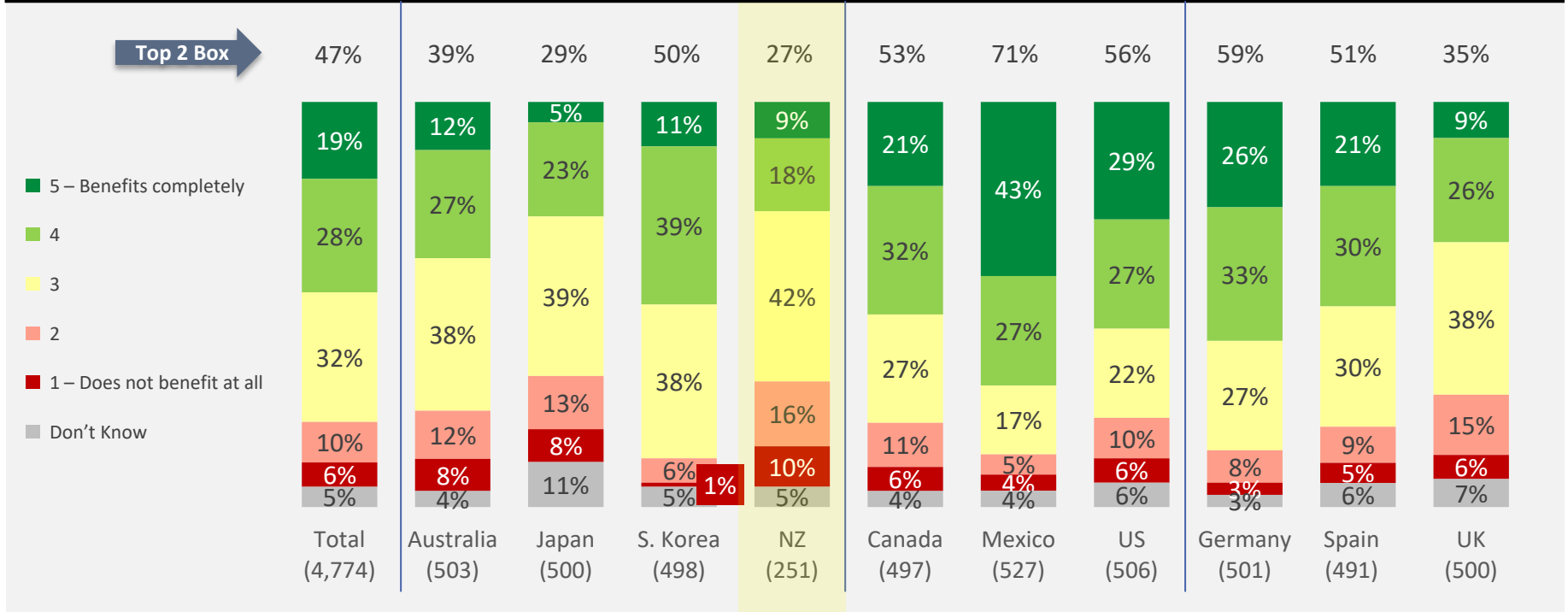




Overall, less than half feel that market research benefits them – this negative sentiment is driven by those in Australia, Japan, New Zealand, and the UK.



### Extent Market Research is Perceived to be Beneficial to Yourself

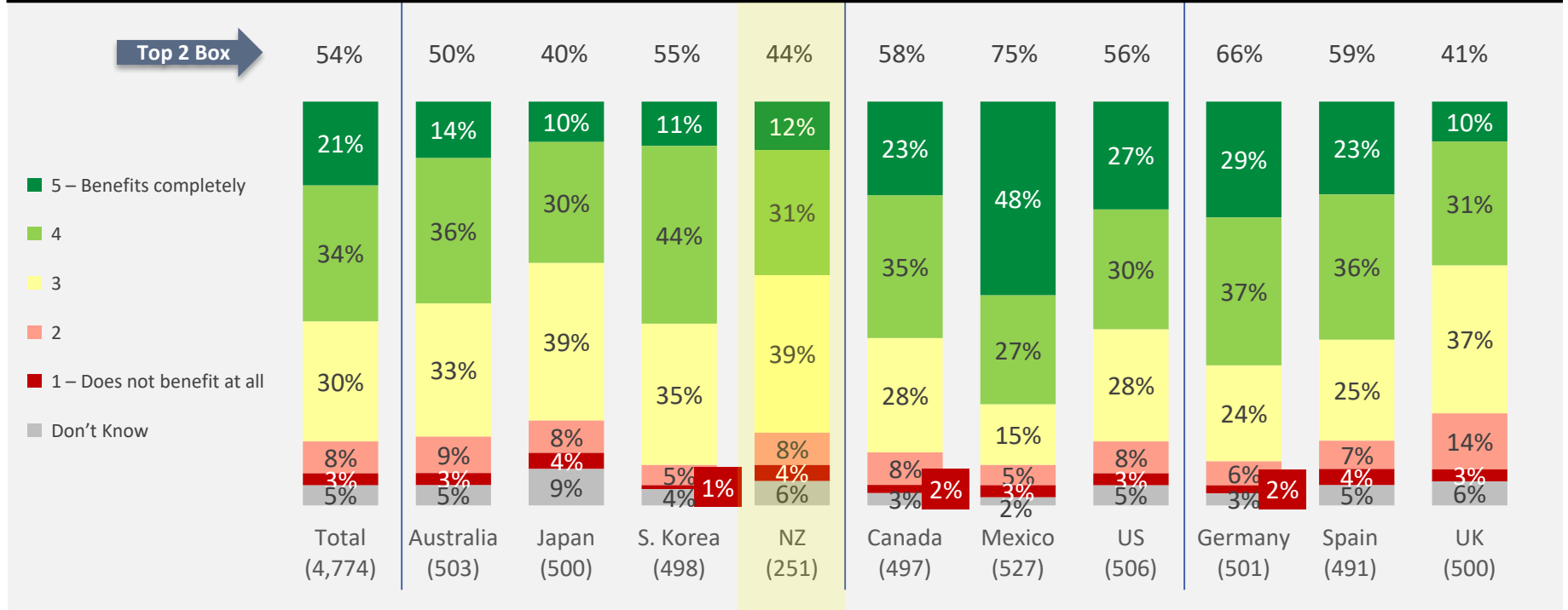




Most recognize some benefit of market research to consumers – New Zealand falls below the global average in this regard.



### Extent Market Research is Perceived to be Beneficial to Consumers



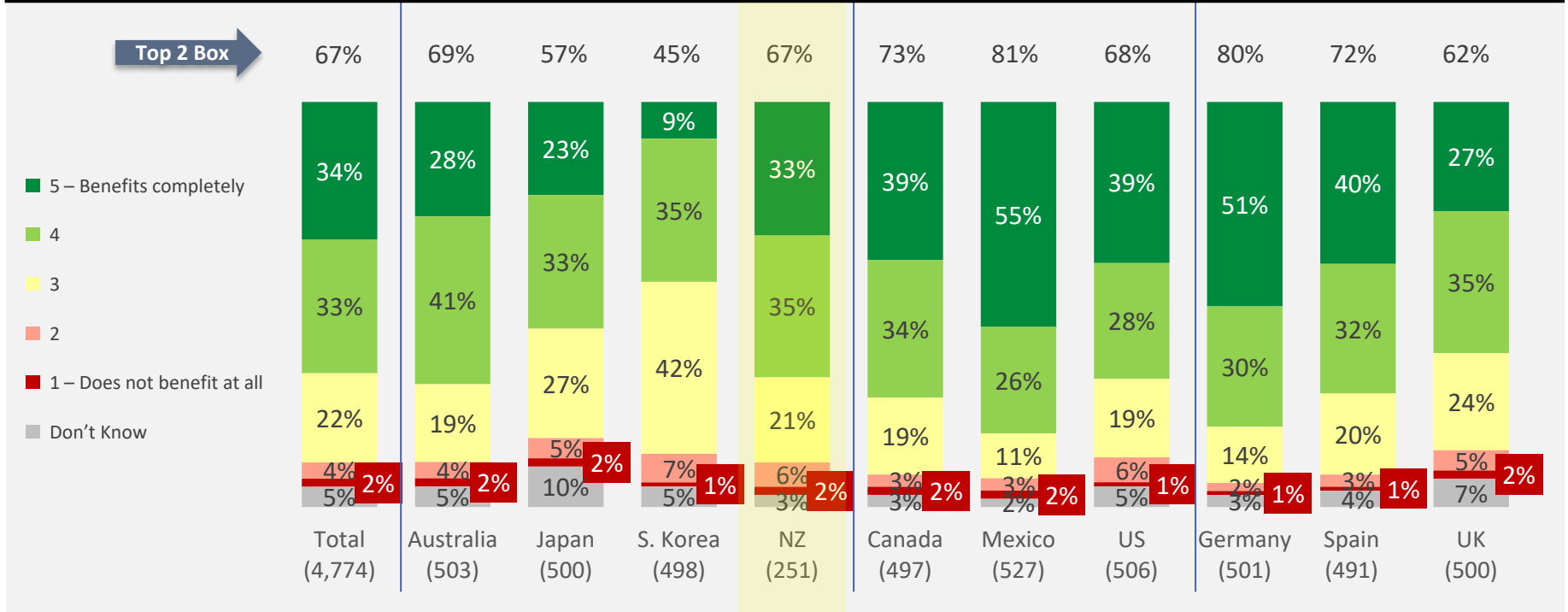




Many consider market research highly beneficial to businesses, and New Zealand is on par with the global average.



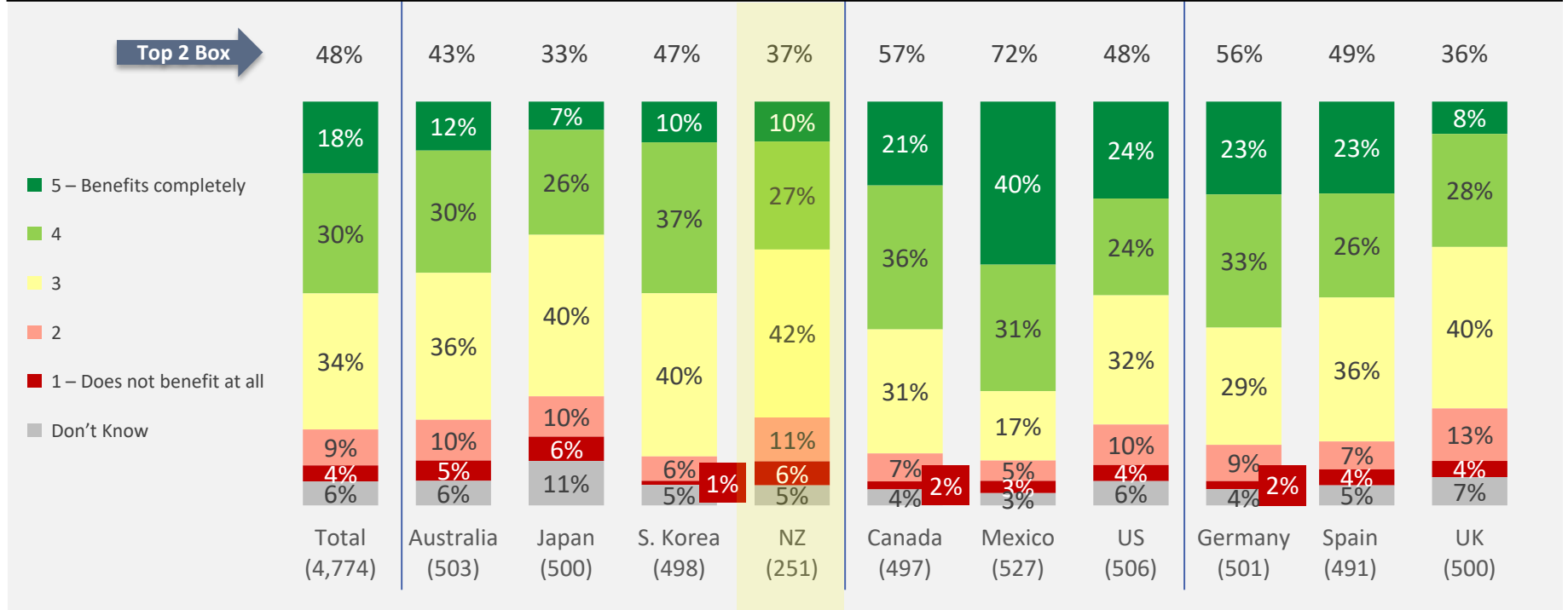
### Extent Market Research is Perceived to be Beneficial to Business





Less than half recognize the benefits of market research to citizens, with Mexico showing the most conviction, while Japan, New Zealand, and the UK exhibit the least.

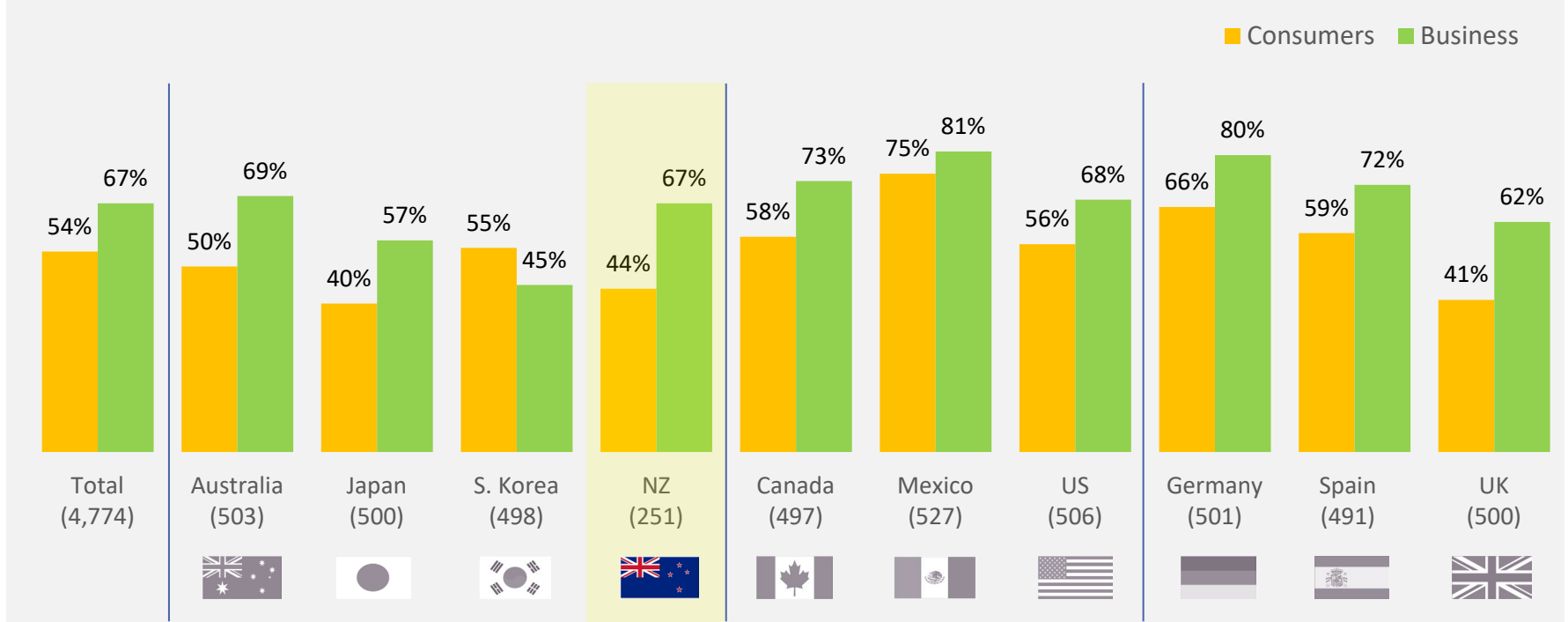
### Extent Market Research is Perceived to be Beneficial to Citizens





Globally, market research is deemed more beneficial to businesses vs. consumers.

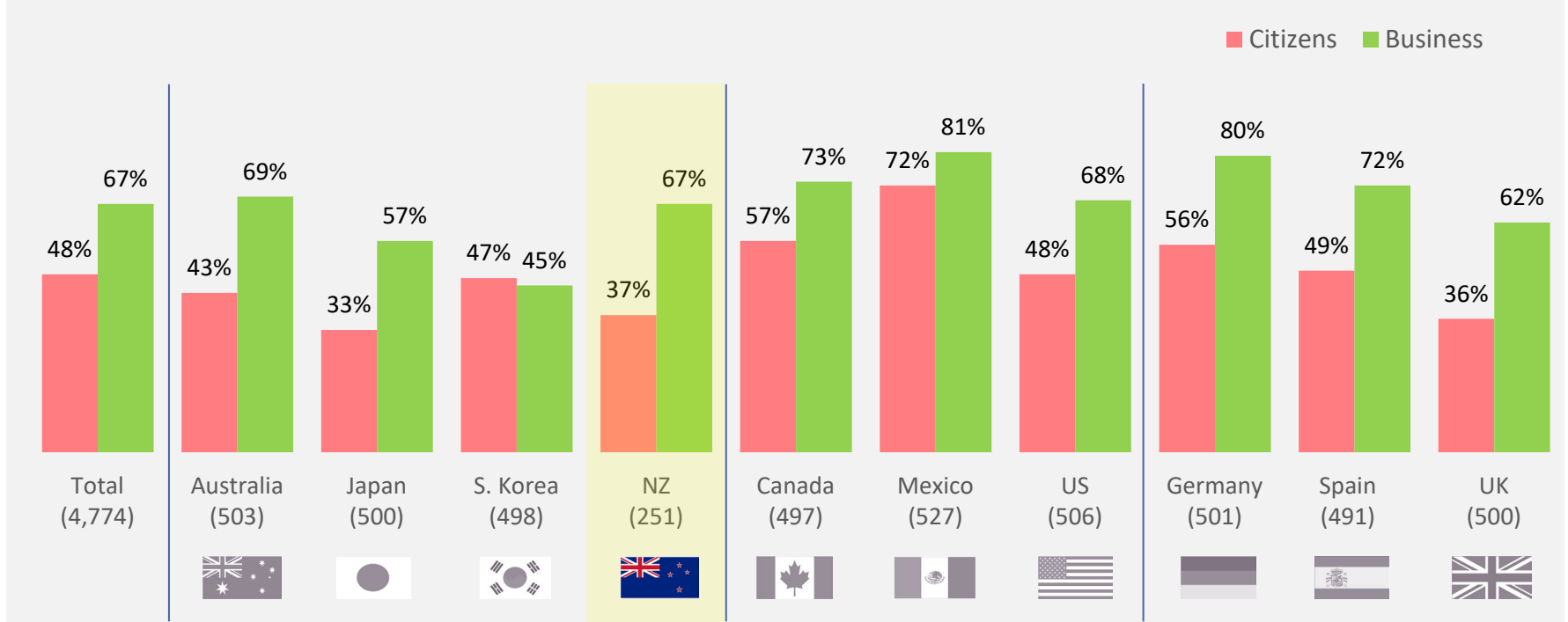
## Extent Market Research is Perceived to be Beneficial to Consumers vs. Business (Top 2 Box)



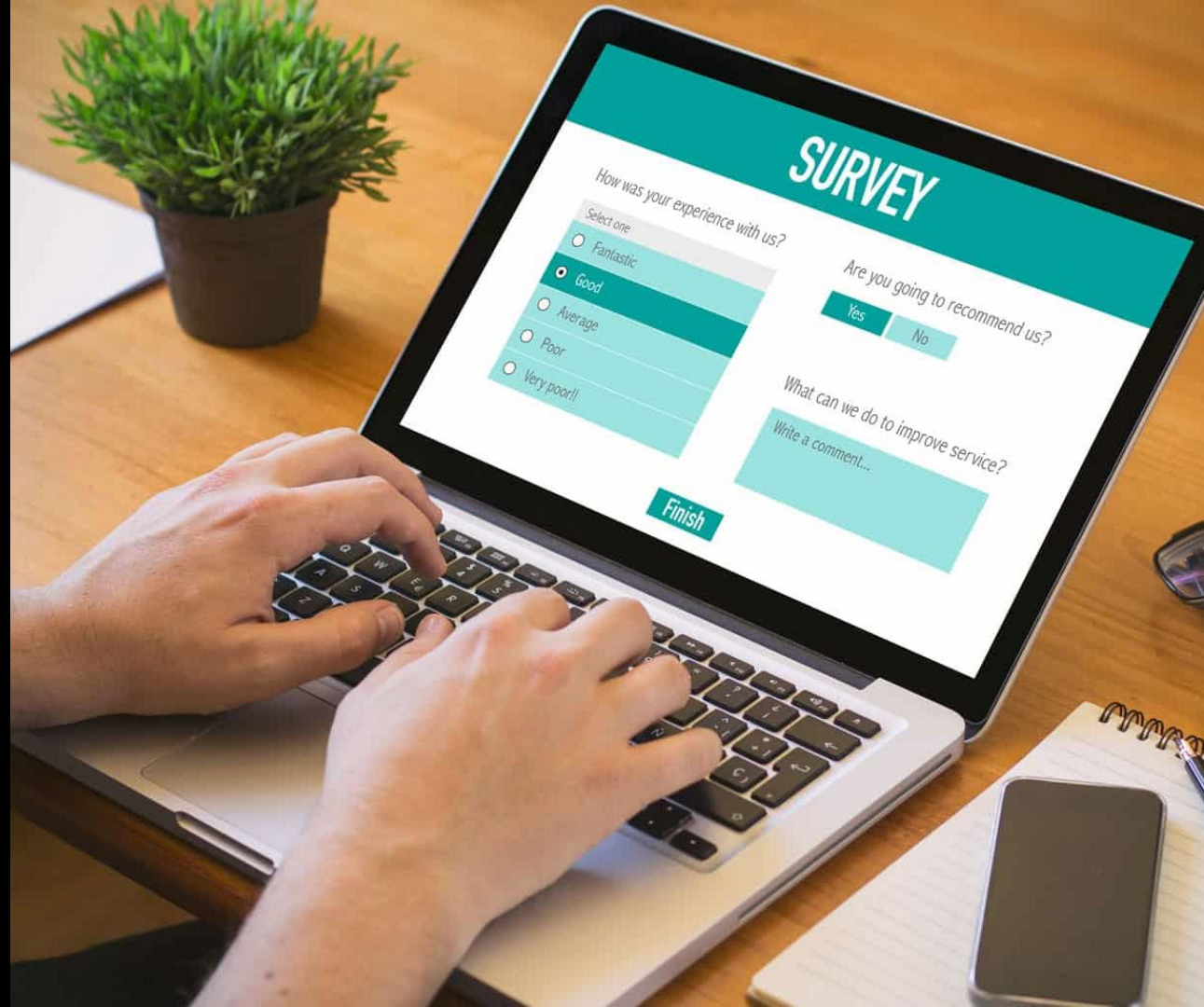


Likewise, market research is considered much more beneficial to businesses than to citizens on a global basis.

## Extent Market Research is Perceived to be Beneficial to Citizens vs. Business (Top 2 Box)



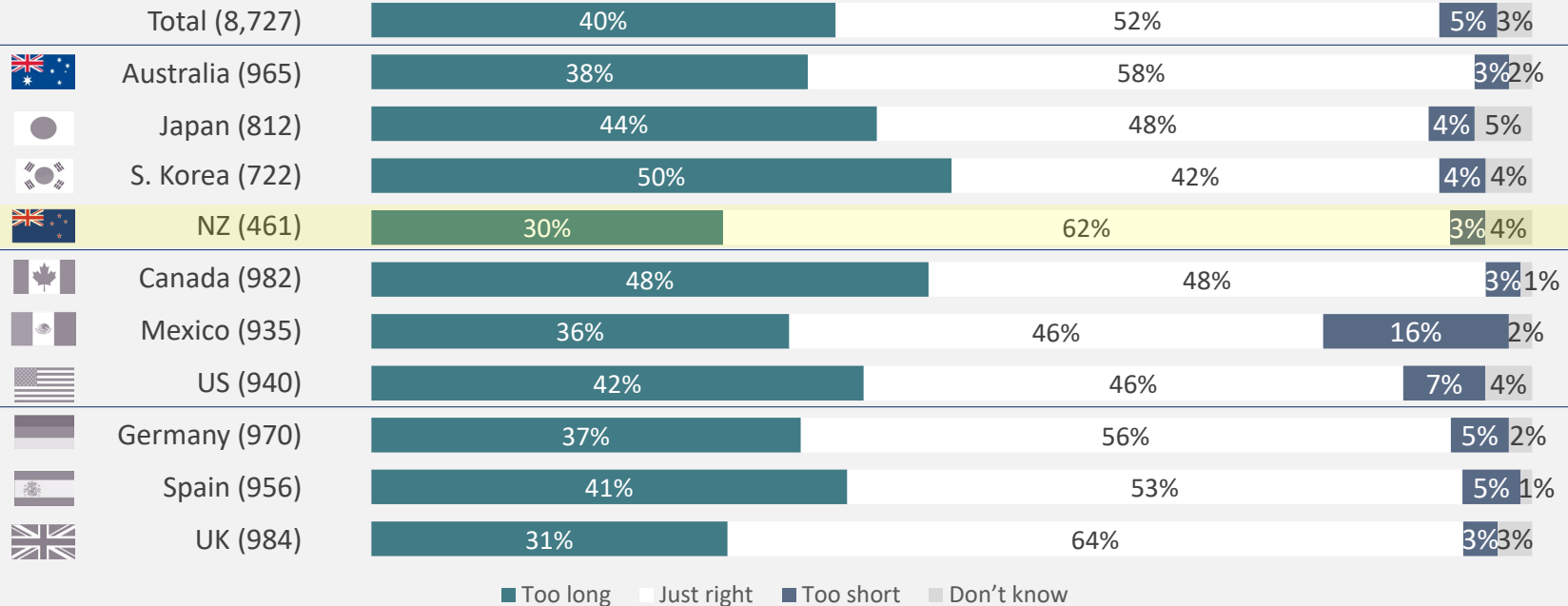
## REACTIONS TO THE PARTICIPANT EXPERIENCE





While survey length is generally considered acceptable in New Zealand, there's a portion who would appreciate shorter surveys.

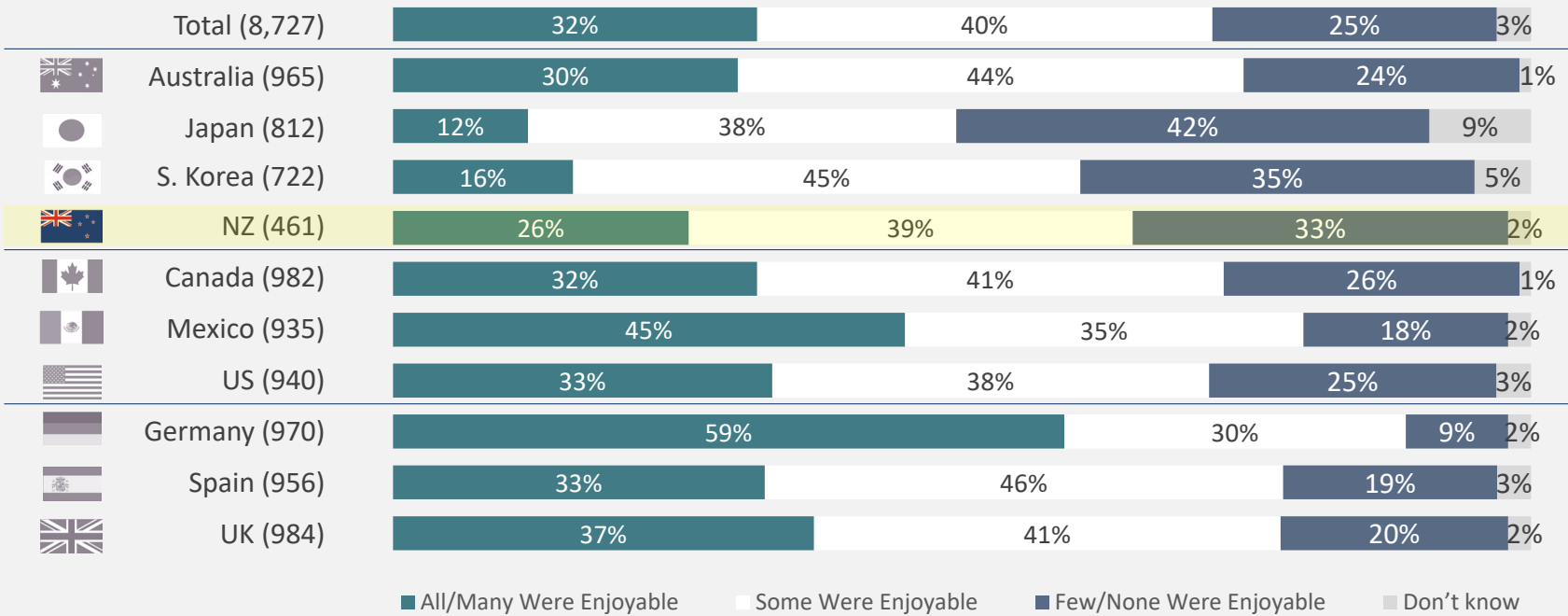
## Perception of Survey Length





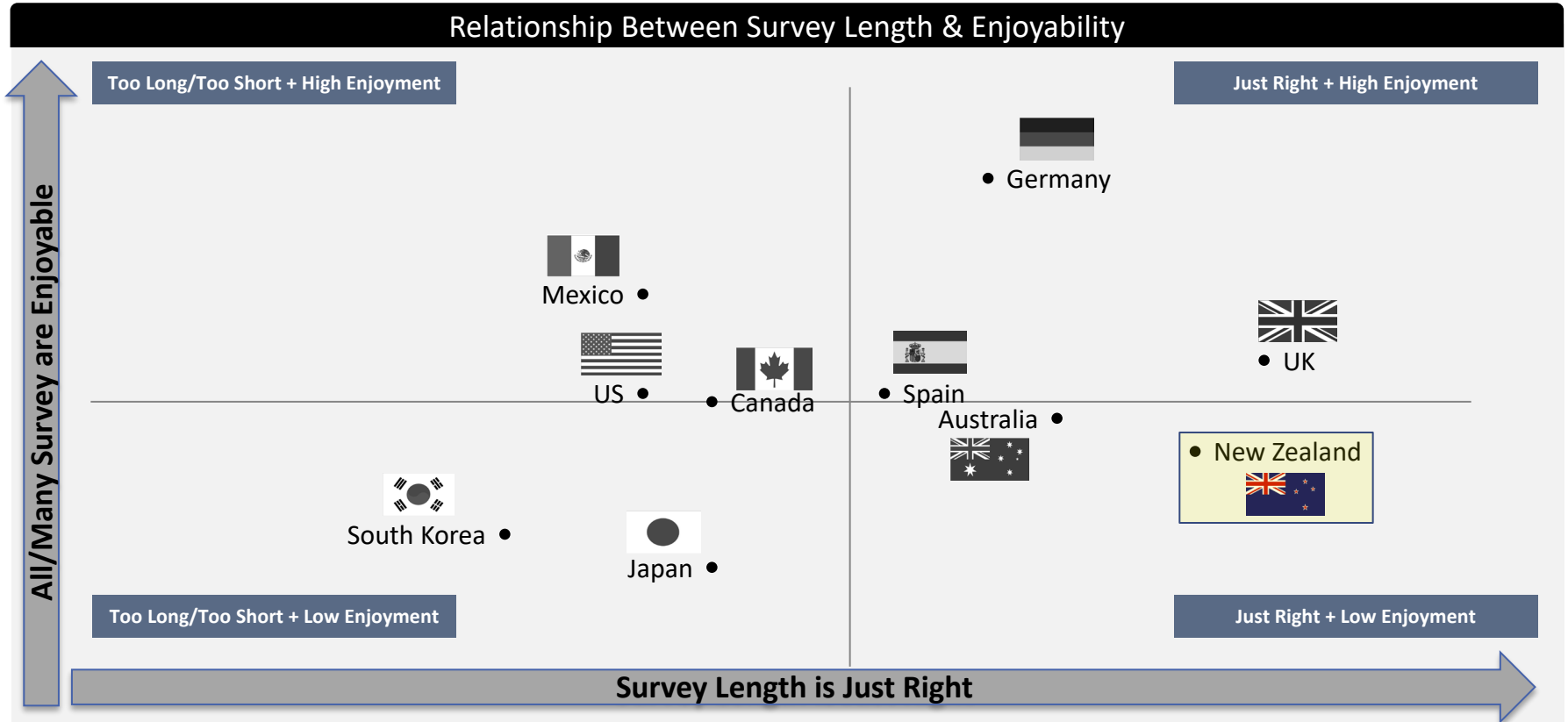
Survey enjoyment varies greatly across countries – those in the New Zealand are enjoying their survey experiences slightly less than the global average.

### Perception of Survey Enjoyability





There's a positive relationship between survey length and enjoyment in Germany and the UK; however, New Zealanders report below-average enjoyment despite being content with survey length.





**PERSONAL DATA USE**





While many in New Zealand are aware of how their personal data is collected and used, some are unfamiliar, indicating a need for education.



New Zealand



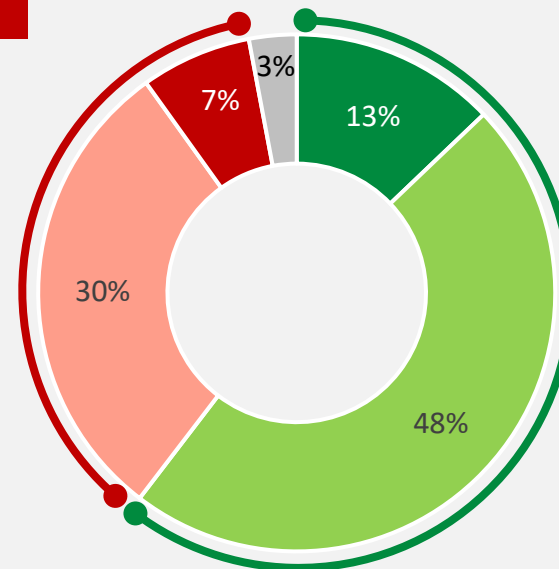
## Familiarity with Personal Data Collection & Use

Not Very/At All Familiar

Very/Somewhat Familiar

2024: 36%

2024: 61%



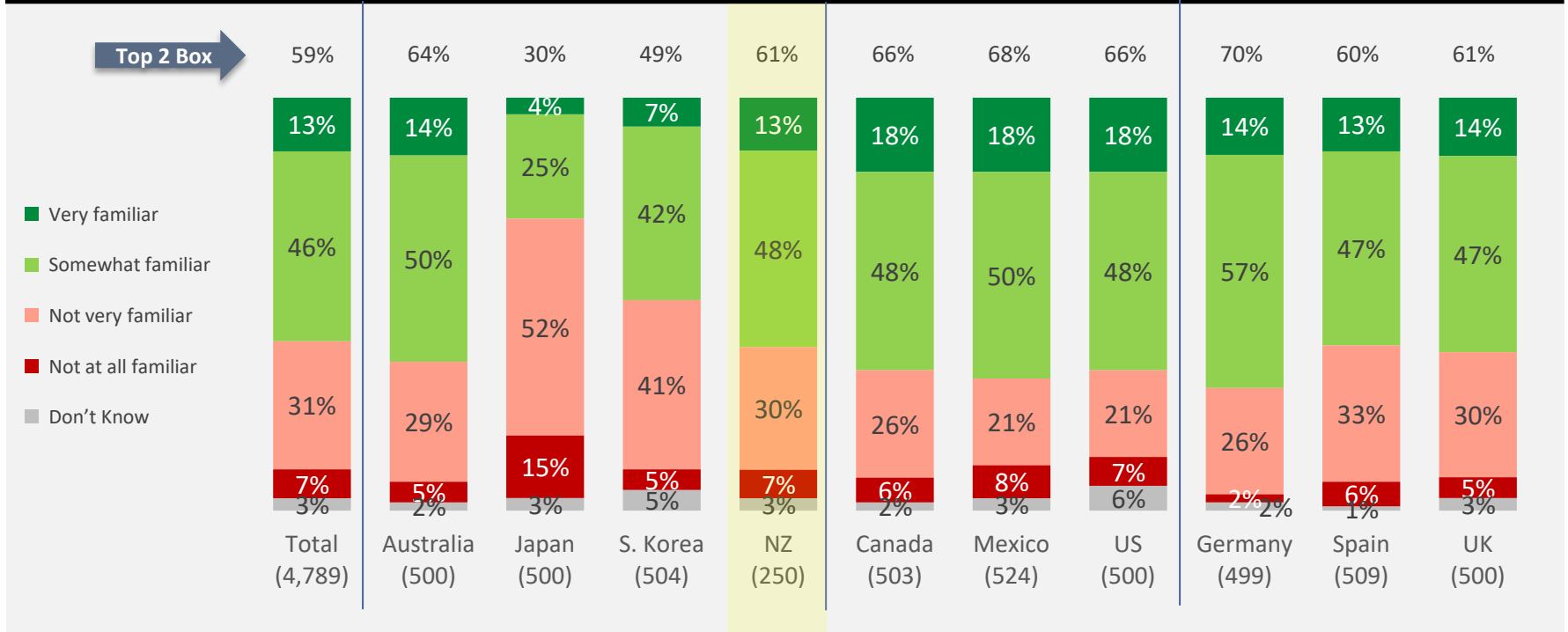
Very familiar Somewhat familiar Not very familiar Not at all familiar Don't Know



Knowledge of personal data collection and usage practices in New Zealand is similar to the global average.



### Familiarity with Personal Data Collection & Use





Misuse of personal data is a major concern in New Zealand.



New Zealand



### Level of Concern Regarding Misuse of Personal Data

Not Very/At All Concerned

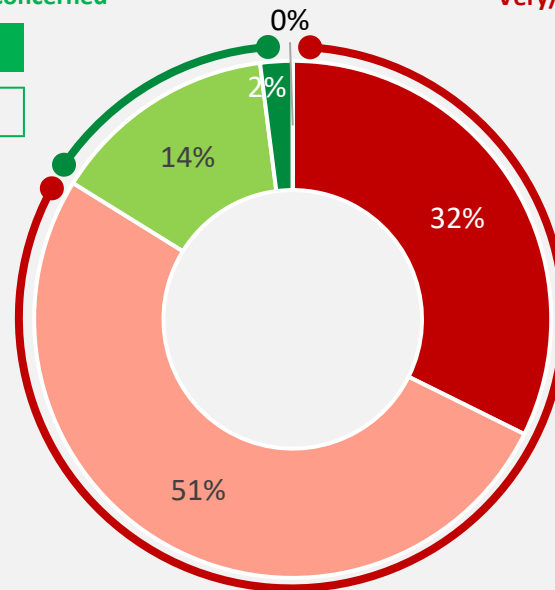
2024: 16%

2022: NA

Very/Somewhat Concerned

2024: 83%

2022: NA



Very concerned

Somewhat concerned

Not very concerned

Not at all concerned

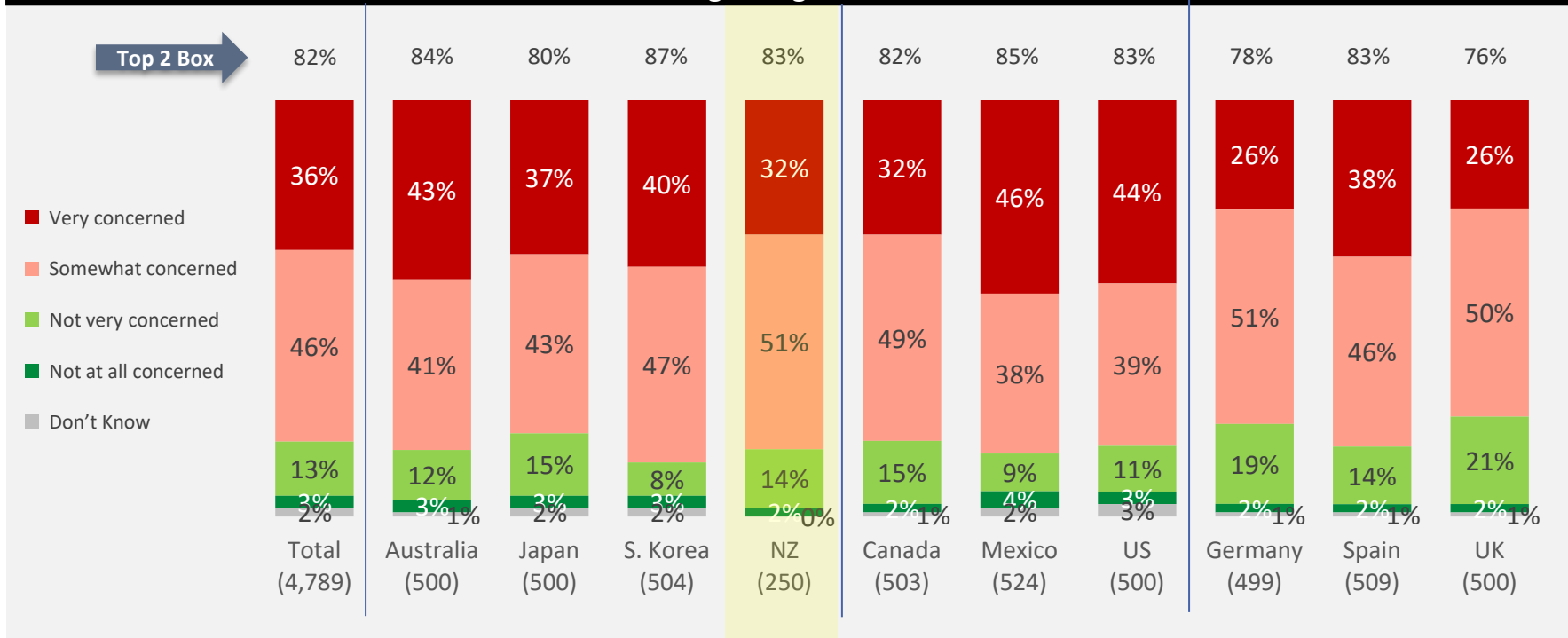
Don't know/Prefer not to say



## Concerns about the misuse of personal data are consistent globally.



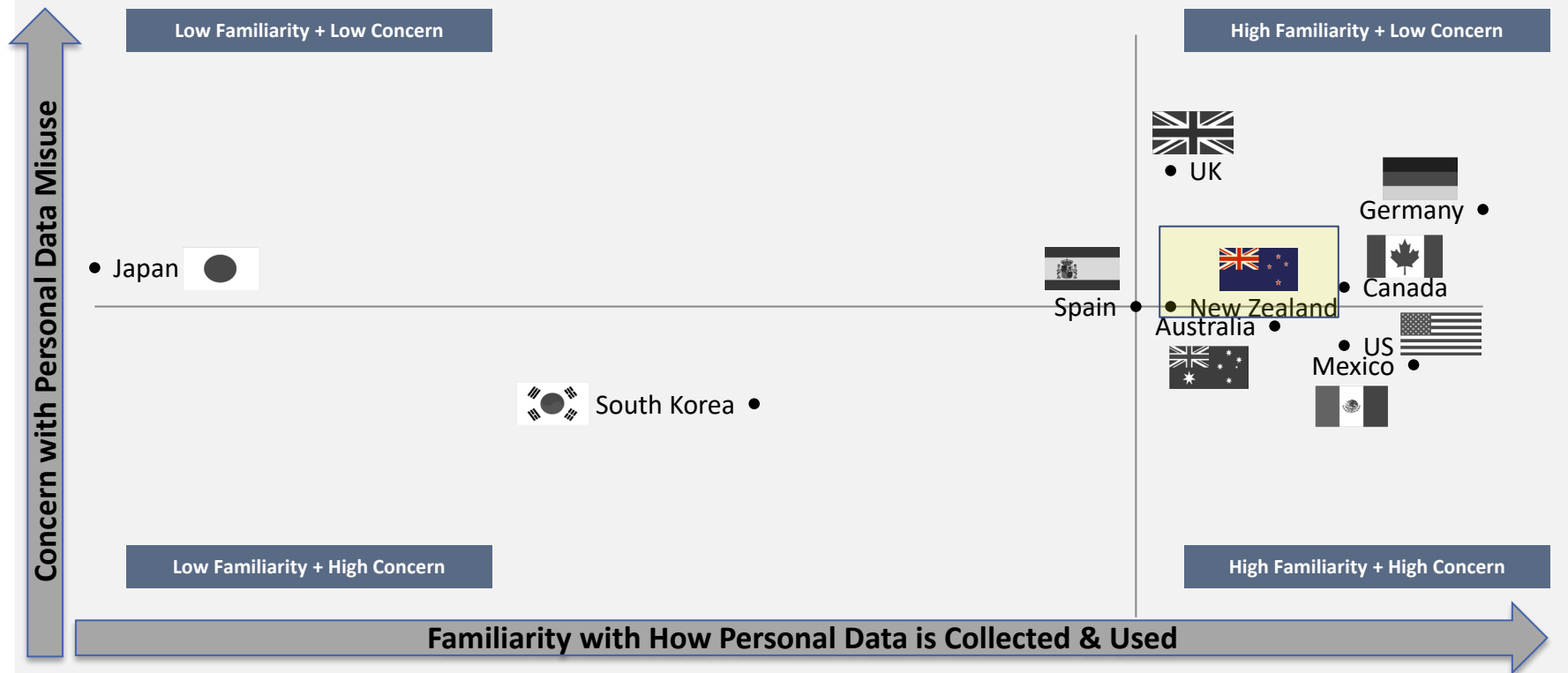
### Level of Concern Regarding Misuse of Personal Data





Knowing how personal data is collected doesn't assuage concerns for all.

## Relationship Between Familiarity & Concern of Misuse of Personal Data Use



**PROTECTION & USE  
OF PERSONAL DATA**

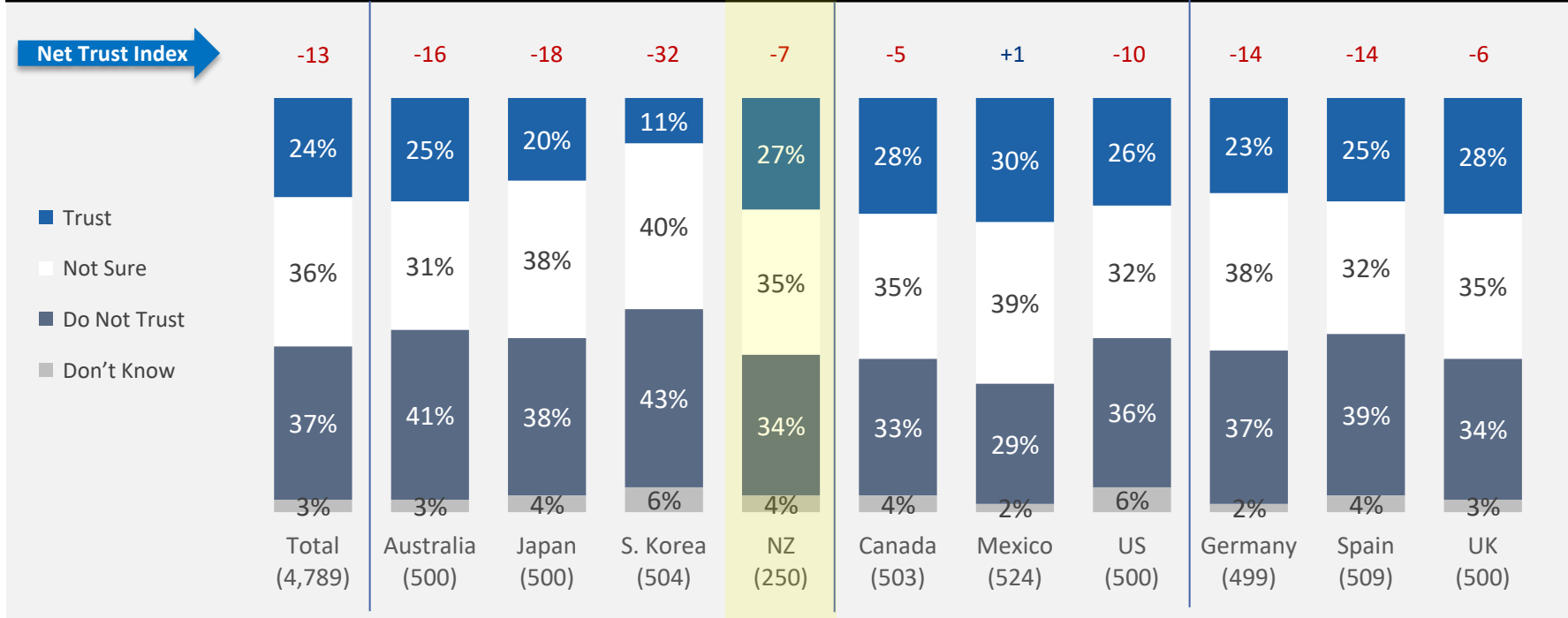




Concern exists in all countries regarding trust in organizations' abilities to protect and use consumer data responsibly. In this regard, New Zealand is slightly above the global average.



### Average Level of Trust that Organizations/Professionals Protect & Appropriately Use Personal Data†



Net Trust Index = % Trust – % Do Not Trust

†Scores are an average across the 15 industries/organizations analyzed



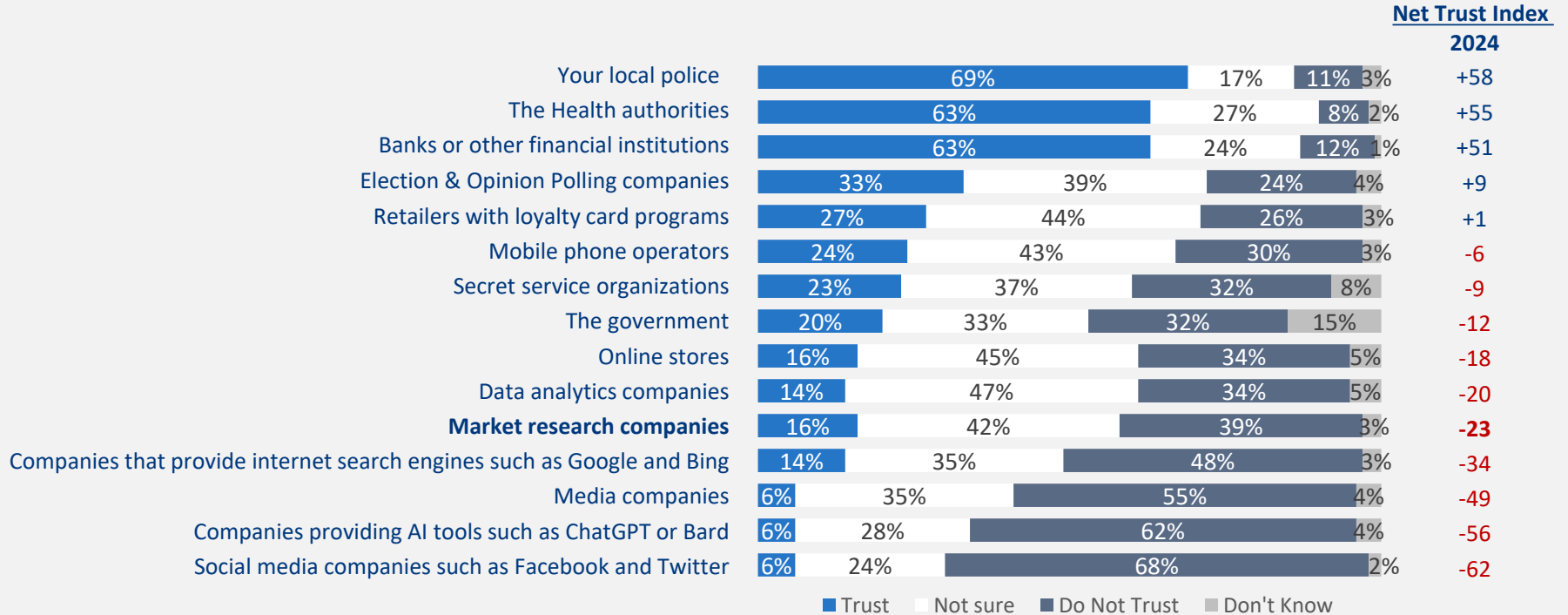


Law enforcement, health authorities and financial institutions hold the public's highest trust in safeguarding personal data in New Zealand. Conversely, media companies, AI providers and social media platforms face the most distrust. Market research firms also rank towards the bottom in this regard.



New Zealand

## Level of Trust that Organizations/Professionals Protect and Appropriately Use Personal Data



Net Trust Index = % Trust – % Do Not Trust

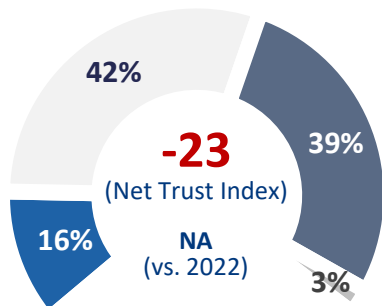


Net trust in election and polling companies' protection and use of personal data is positive in New Zealand, whereas consumers have less faith in market research and data analytics companies in this aspect.

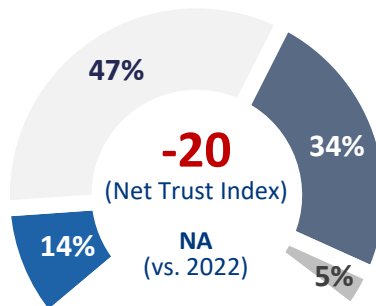


New Zealand

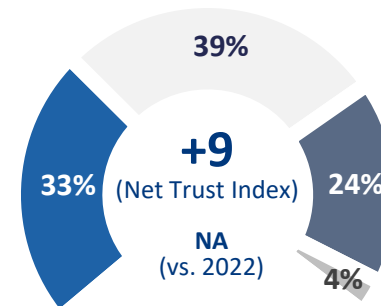
### Trust in Market Research



### Trust in Data Analytics



### Trust in Election & Opinion Polling



- Trust
- Not Sure
- Do Not Trust
- Don't know

*Net Trust Index = % Trust – % Do Not Trust*



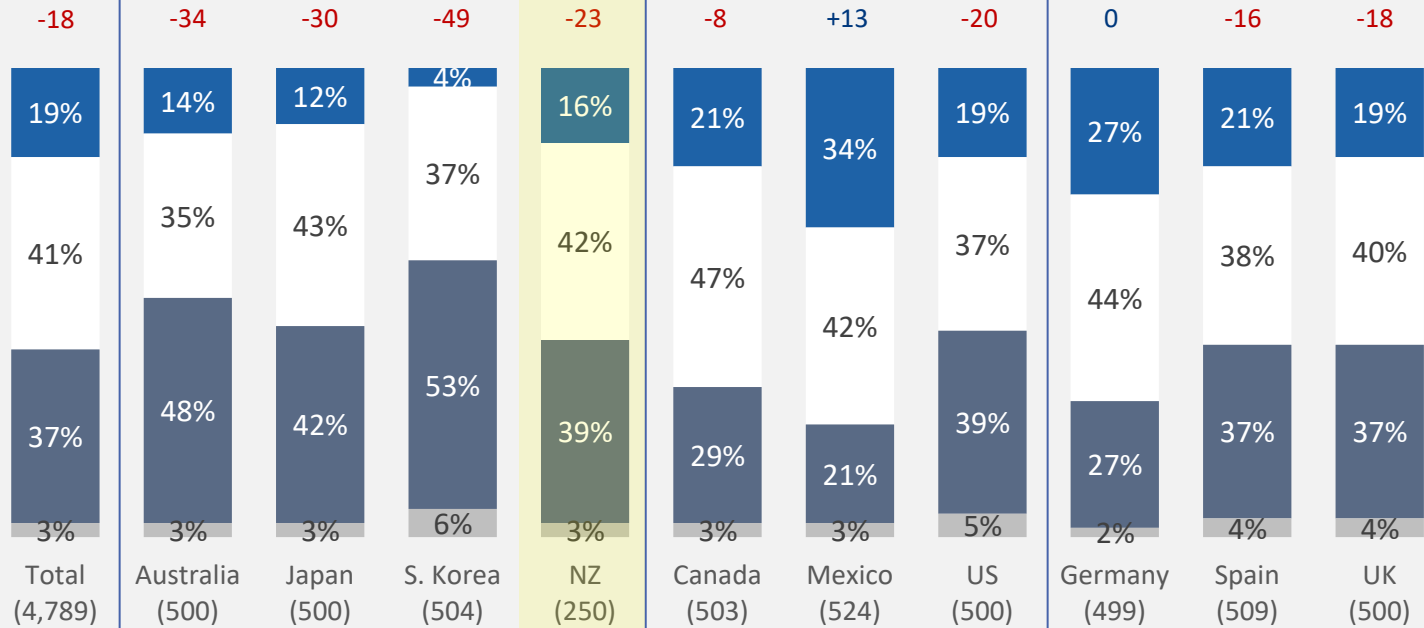
There's little trust in the ability of market research companies to protect and use personal data responsibly – New Zealand is slightly lower than the global average on a net basis.



### Trust in Market Research to Protect & Appropriately Use Personal Data

Net Trust Index

- Trust
- Not Sure
- Do Not Trust
- Don't Know

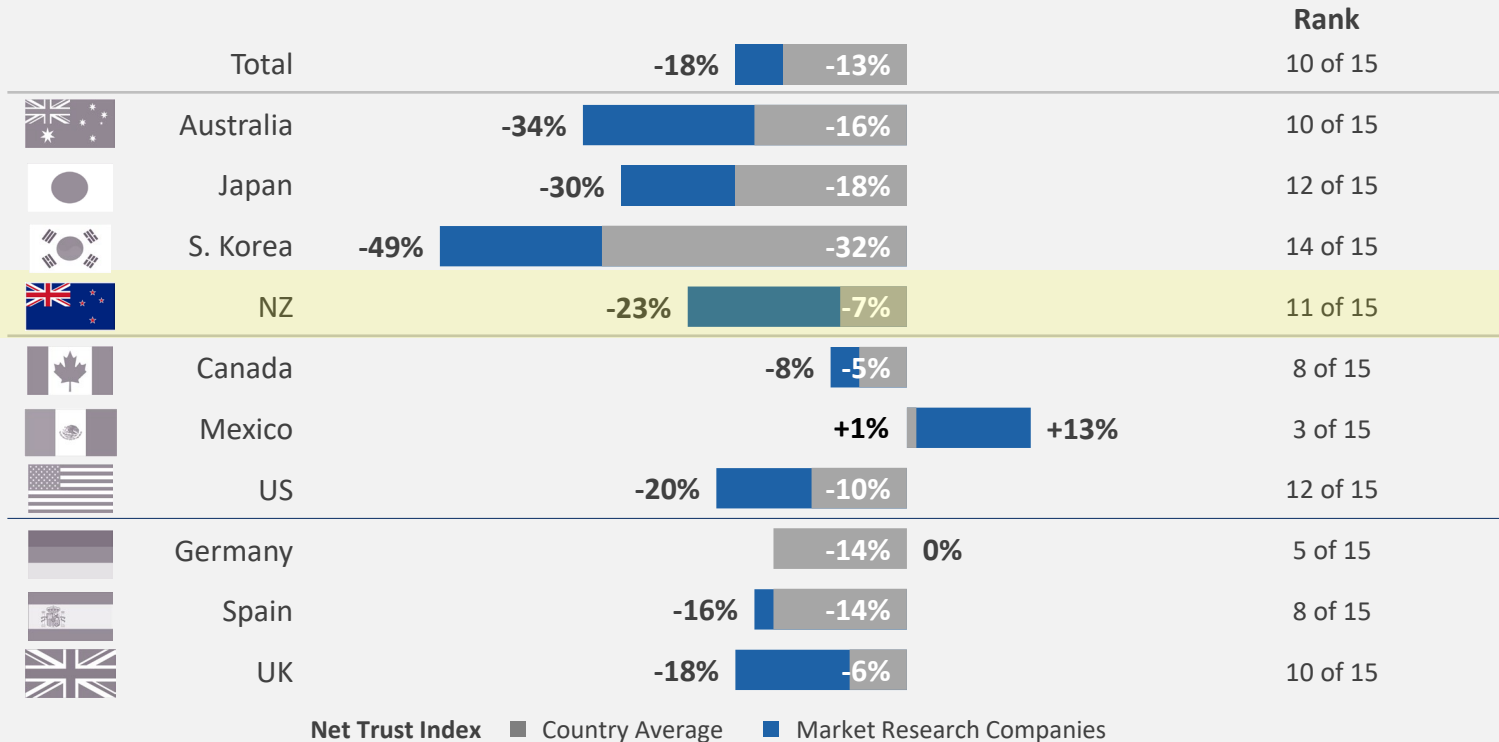


Net Trust Index = % Trust – % Do Not Trust



Relative to other industries, market research companies perform in the bottom third in New Zealand and most other countries.

### Trust in Market Research to Protect & Appropriately Use Personal Data (vs. Country Average)



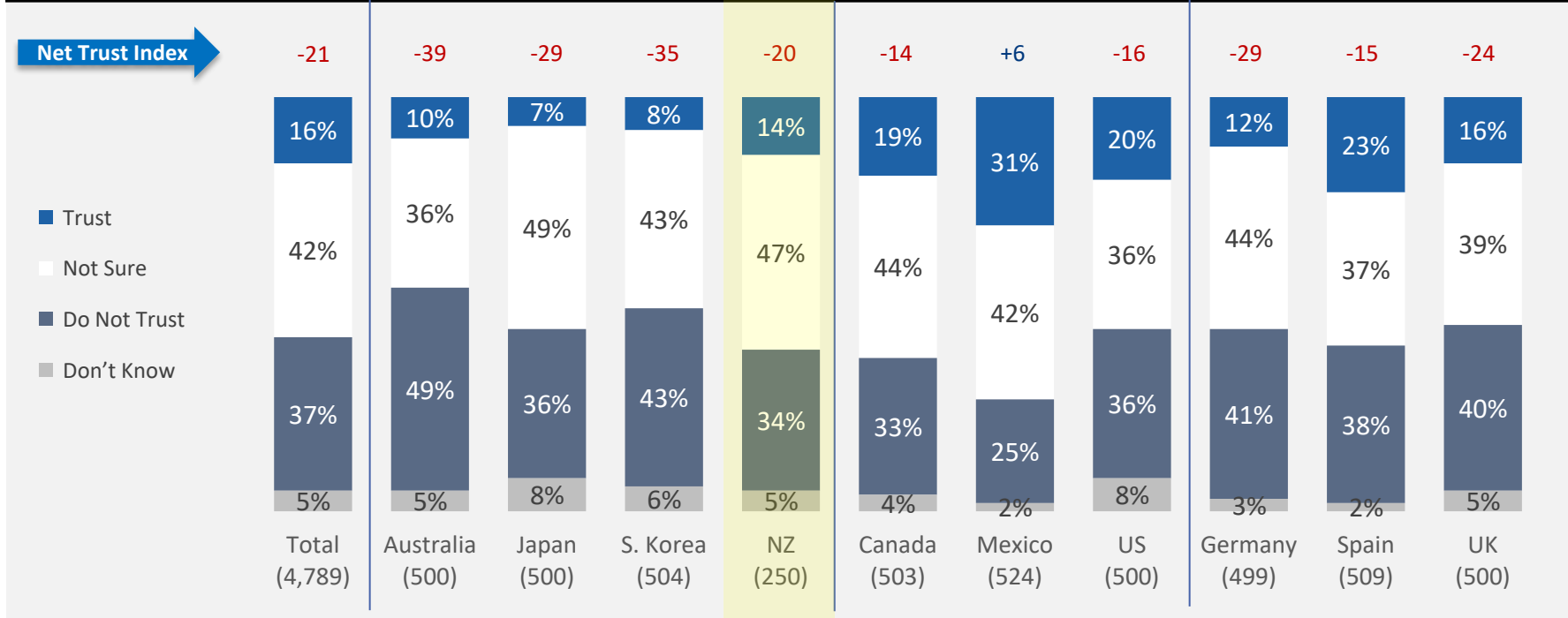
Net Trust Index = % Trust – % Do Not Trust



Globally, there's deep distrust in data analytics companies' perceived handling of personal data. In this regard, net trust in New Zealand is on par with the global average.



### Trust in Data Analytics to Protect & Appropriately Use Personal Data



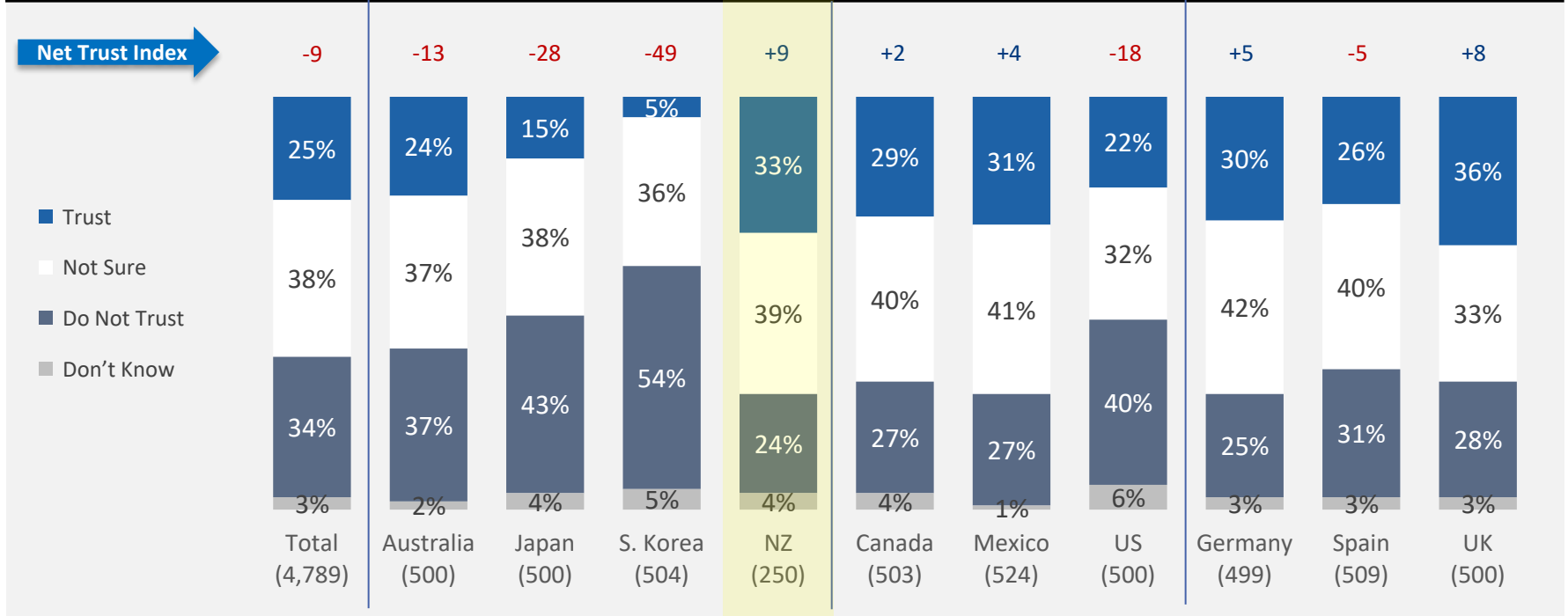
Net Trust Index = % Trust – % Do Not Trust



Trust in polling companies' data handling varies widely – South Korea and Japan are most skeptical, while those in NZ, the UK, Germany, Mexico, and Canada are most trusting.




### Trust in Election & Opinion Polling to Protect & Appropriately Use Personal Data



Net Trust Index = % Trust – % Do Not Trust

**DRIVERS OF TRUST IN  
MARKET RESEARCH TO  
PROTECT &  
APPROPRIATELY USE  
PERSONAL DATA**



A magnifying glass with a black handle and frame is positioned over a list of personal data fields. The background features a stylized fingerprint pattern of grey lines on a white background. The magnifying glass is centered over the text, which is rendered in a bold, sans-serif font. The text is arranged in a vertical list, with some words in larger, bolder fonts than others. The magnifying glass's lens is the largest element, and its handle extends to the right edge of the frame.

FULL NAME  
**AGE** GENDER  
TELEPHONE NUMBER  
TAX INFO ADDRESS  
**CITIZENSHIP**  
BIRTH DATE EDUCATION  
TRAVEL DOCUMENT  
NATIONAL IDENTITY NUMBER  
CRIMINAL RECORD  
NATIONALITY  
MARITAL STATUS  
INCOME INFO  
IDENTITY DOCUMENT  
BANK ACCOUNT NUMBER  
OCCUPATION VISA INFO  
MEDICAL RECORD



Public opinion on the use of personal data by market research companies is deemed more inappropriate than appropriate in New Zealand.



New Zealand



## Appropriate Use of Personal Data by Market Research

Bottom 2 Box: Inappropriate

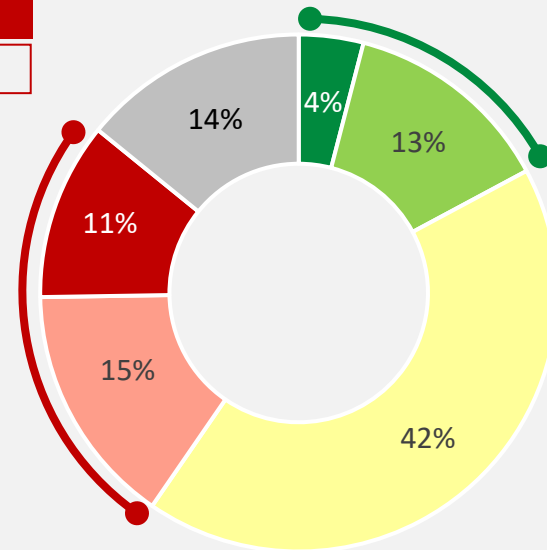
2024: 26%

2022: NA

Top 2 Box: Appropriate

2024: 17%

2022: NA



■ 5 - Completely appropriate ■ 4 ■ 3 ■ 2 ■ 1 - Completely inappropriate ■ Don't know

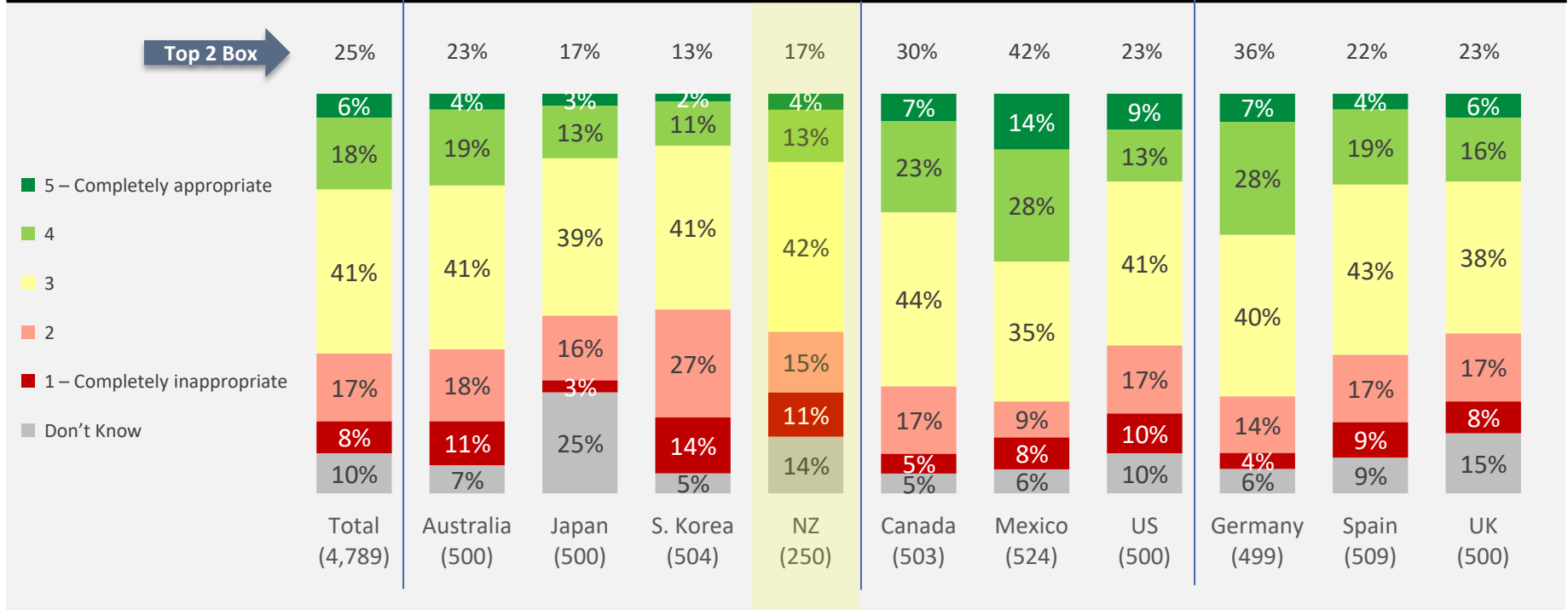




This mixed sentiment is evident across countries – Mexico and Germany being the most favorable, while South Korea, Japan and New Zealand are least so.



### Appropriate Use of Personal Data by Market Research





Market research companies face a fair amount of concern over data protection in NZ.



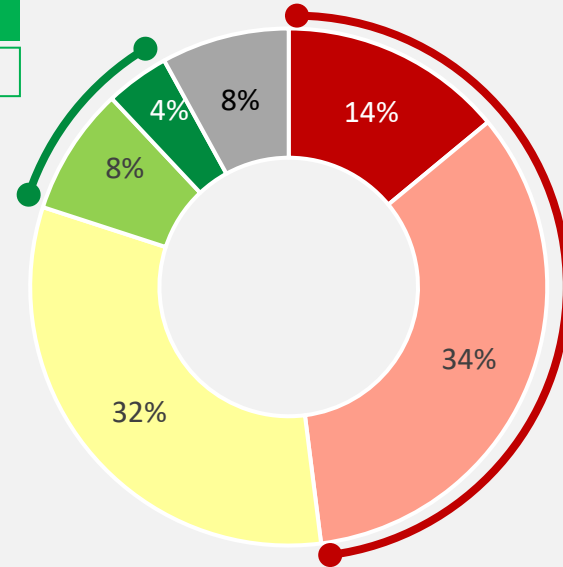
### Concern that Market Research Securely Protects Personal Data

Bottom 2 Box: Not Concerned

2024: 11%  
2022: NA

Top 2 Box: Concerned

2024: 48%  
2022: NA



■ 5 - Completely concerned ■ 4 ■ 3 ■ 2 ■ 1 - Not at all concerned ■ Don't know

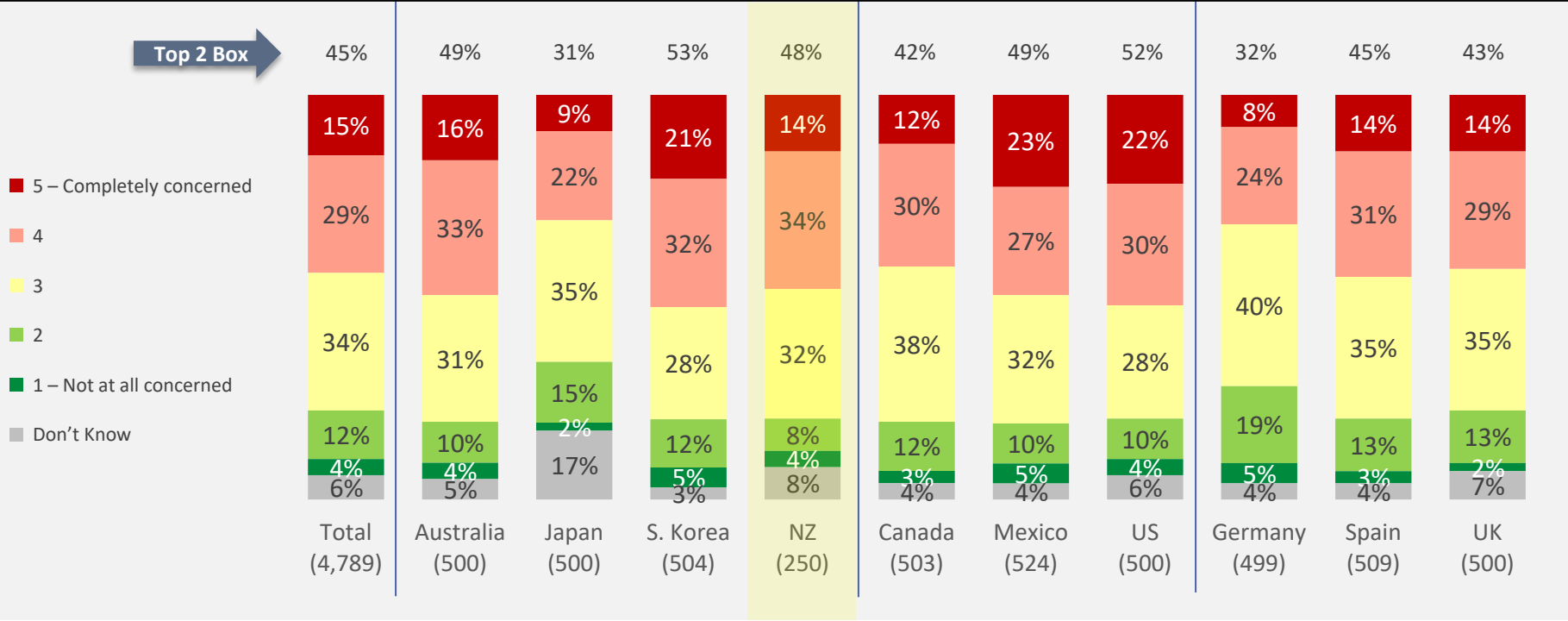


Concern in this regard is consistent with the global average in New Zealand.



### Concern that Market Research Securely Protects Personal Data

Top 2 Box





There is a mixed level of knowledge regarding the collection, storage and usage of personal data by market research companies, and very few in New Zealand feel completely informed.



New Zealand



## Degree Informed about Personal Data Collection, Storage & Use

Bottom 2 Box: Not Informed

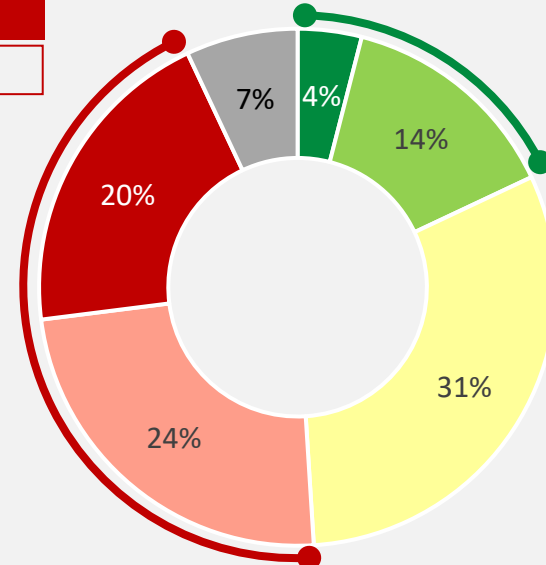
2024: 44%

2022: NA

Top 2 Box: Informed

2024: 18%

2022: NA



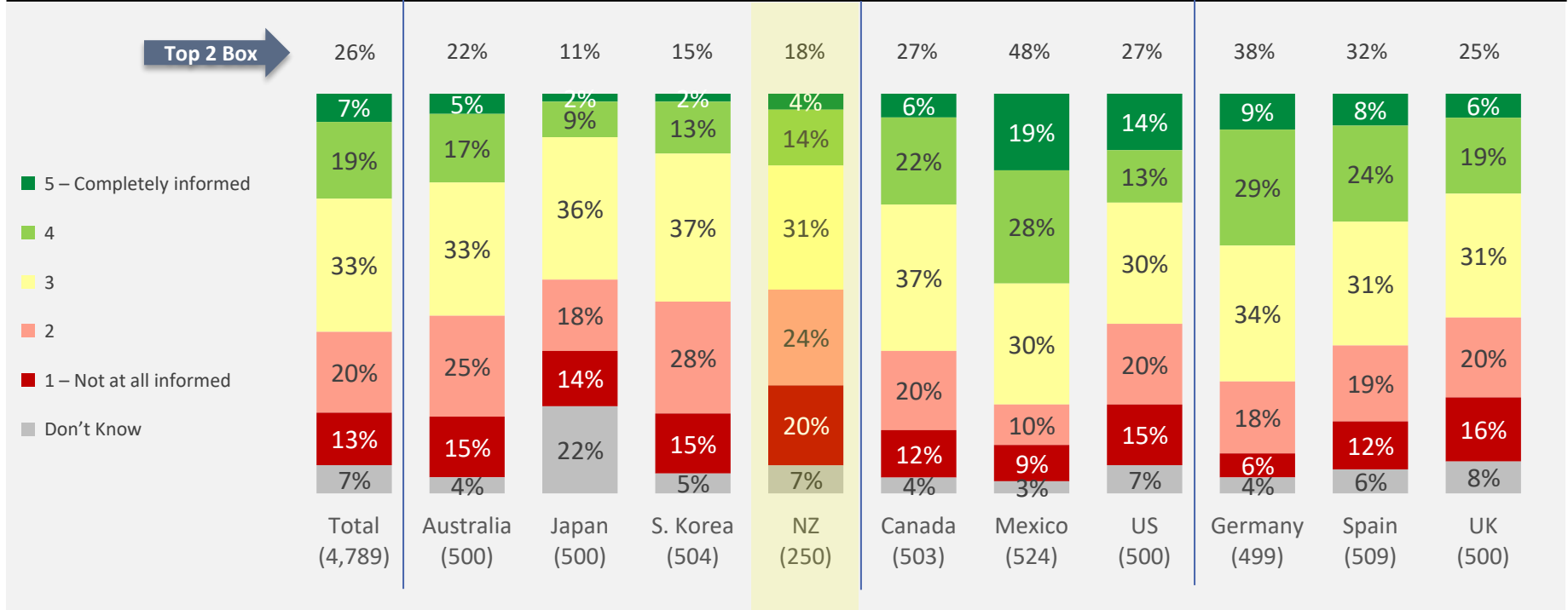
■ 5 - Completely informed ■ 4 ■ 3 ■ 2 ■ 1 - Not at all informed ■ Don't know



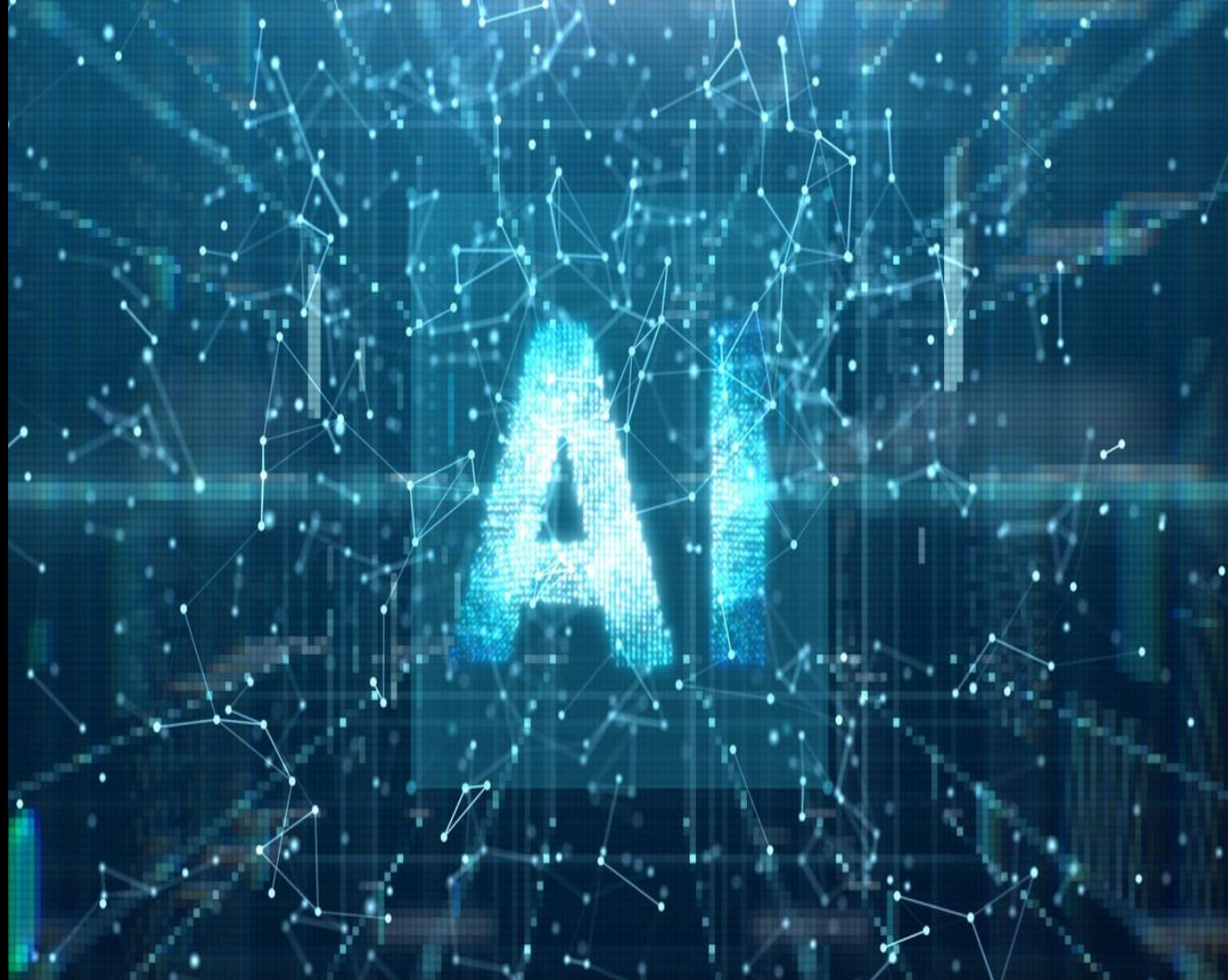
Consumers in Mexico and Germany feel the most informed, while those in Japan, South Korea and New Zealand feel the least so.

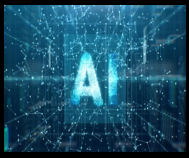


### Degree Informed about Personal Data Collection, Storage & Use



**HOW AI  
IMPACTS  
THE LEVEL OF TRUST**





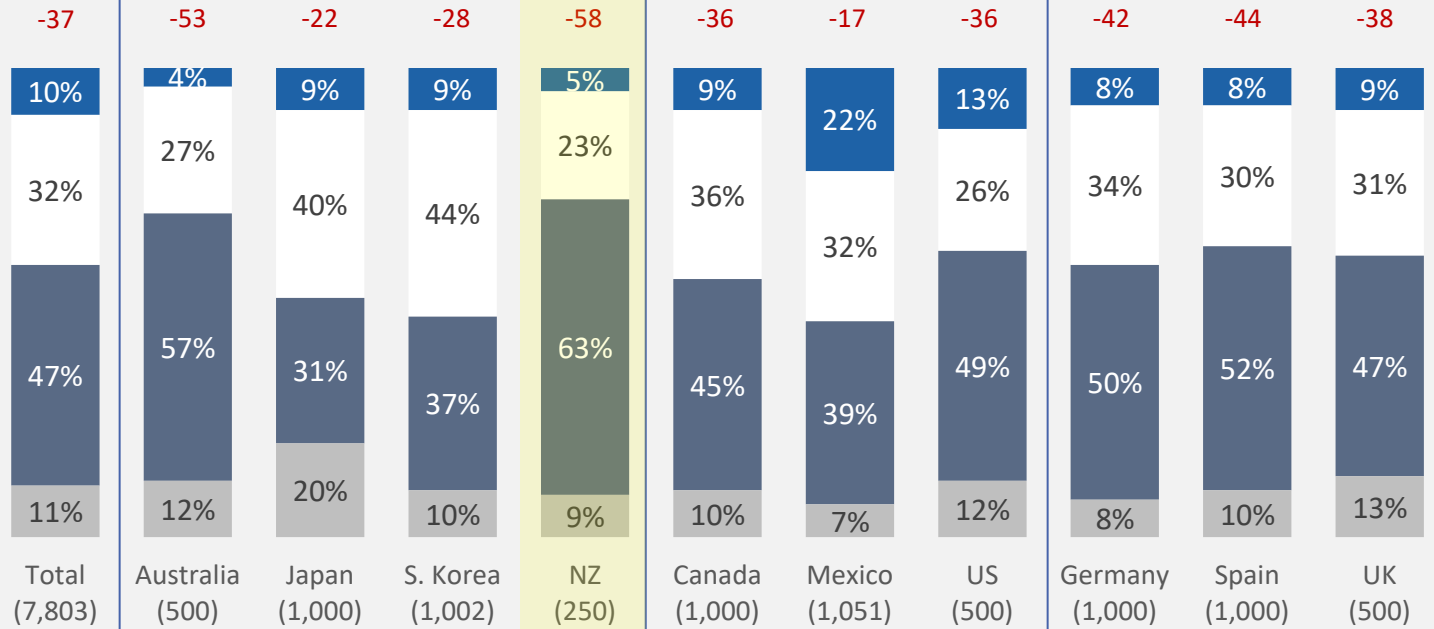
Incorporating AI into market research practices negatively impacts trust in market research companies, especially in New Zealand and Australia.



### Average Impact on Trust of Market Research Companies Using AI†

Net Trust Index

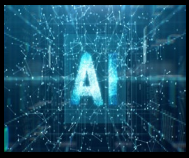
- Increase Trust
- No Impact
- Decrease Trust
- Don't Know



Net Trust Index = % Increase Trust – % Decrease Trust

†Scores are an average across the 5 uses of AI by market research companies





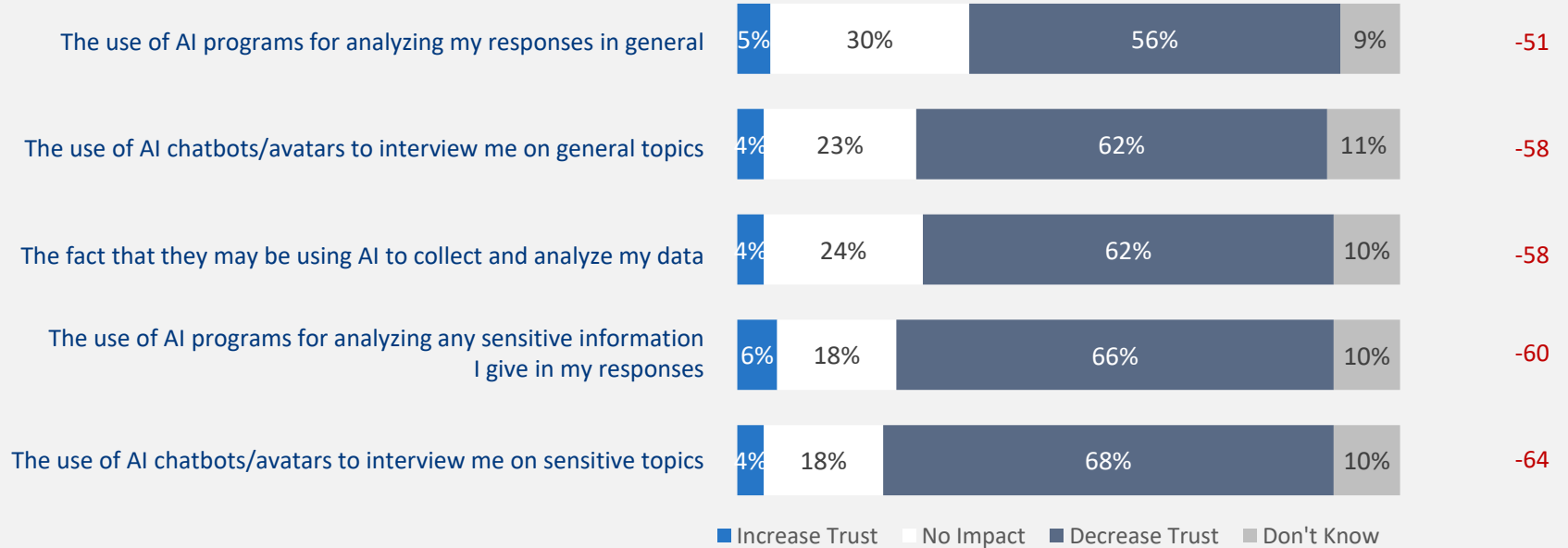
Net trust is negative across all aspects of AI use by market research companies.



New Zealand

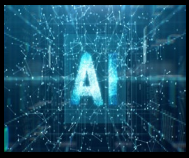
### Levels of Trust in Ways AI is used by Market Research Companies

Net Trust Index  
2024



Net Trust Index = % Increase Trust – % Decrease Trust





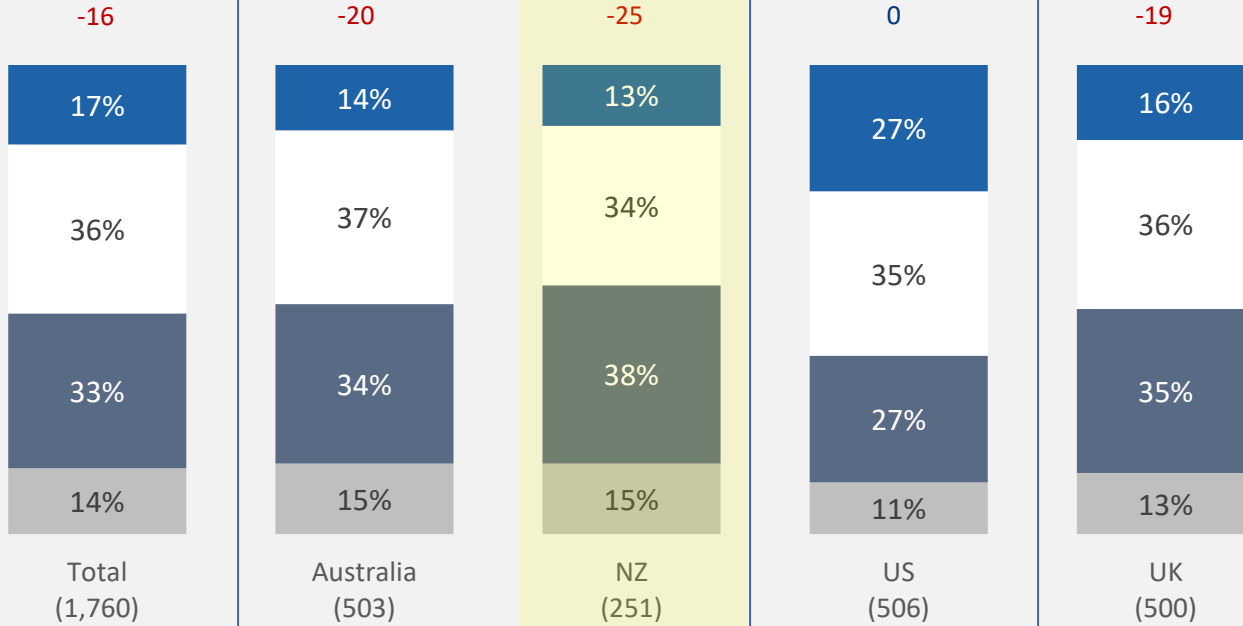
On a net basis, New Zealanders are more negative vs. the global average about how the use of AI by market research companies impacts trustworthiness.



### Average Impact on Trust of Companies Claiming Benefits of Using AI†

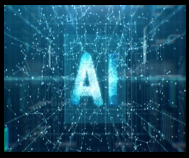
Net Trust Index

- Increase Trust
- No Impact
- Decrease Trust
- Don't Know



Net Trust Index = % Increase Trust – % Decrease Trust

†Scores are an average across the 5 benefits by companies using AI

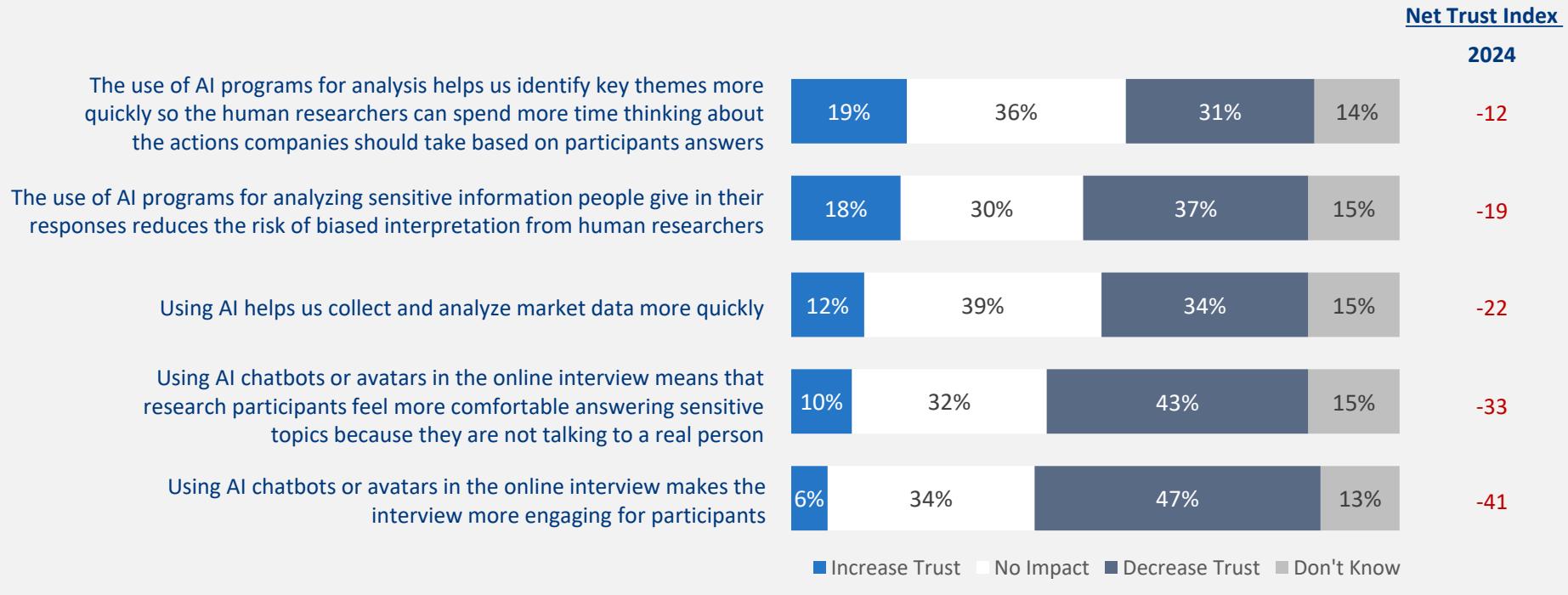


This perceived distrust extends to all claimed benefits, particularly the use of AI chatbots or avatars during interviewing.



New Zealand

## Levels of Trust in Benefits of Using AI Claimed by Companies



Net Trust Index = % Increase Trust – % Decrease Trust

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TRUST AND OTHER GLOBAL  
INDUSTRY INITIATIVES

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